

AN ANALYSIS OF STATE PLANS FOR FINANCING
PUPIL TRANSPORTATION

Thesis for the Degree of Ed. D.
MICHIGAN STATE UNIVERSITY

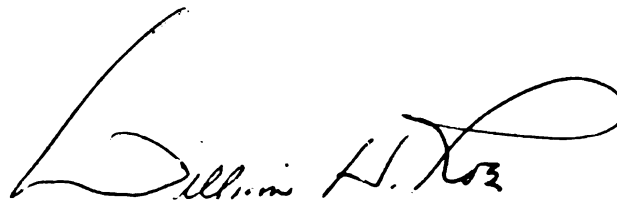
John B. Murray

1964



This is to certify that the
thesis entitled
An Analysis of State Plans for Financing
Pupil Transportation
presented by
John B. Murray

has been accepted towards fulfillment
of the requirements for
Ed.D. degree in Education


Major professor

Date Dec. 16, 1964

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ABSTRACT

AN ANALYSIS OF STATE PLANS FOR FINANCING PUPIL TRANSPORTATION

by John B. Murray

The Problem

Emphasis in this study was focused upon determining whether or not State plans for financing pupil transportation could be profitably analyzed, using a particular approach, thus providing a possible pattern for future studies of this type. No attempt was made to evaluate the strengths and/or weaknesses of any single State plan.

To accomplish this end, it was necessary to:

- A. Identify and analyze the common characteristics of State plans for financing pupil transportation in the fifty States;
- B. Ascertain the current status of certain previously validated criteria for evaluating State plans for financing pupil transportation;
- C. Analyze in detail the State aid plans for financing pupil transportation in the five Great Lakes States of Michigan, Illinois, Indiana, Ohio, and Wisconsin, specifically in terms of:

the statutory basis, the relationship of State transportation aid to the total State program, the State aid distribution plan (formulas) for allocating pupil transportation aid, and

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- D. Determine, on the basis of this analysis, whether or not recommendations could be evolved for the possible improvement of State plans for financing pupil transportation in the United States.

Procedure, Technique, and Data

Identification and analysis of characteristics of State plans for financing pupil transportation was made on the basis of a survey of the fifty States.

Twelve considerations (criteria), representing basically those developed by Covert in 1946, were submitted to the fifty State directors of pupil transportation in order to determine their current status.

Certain data were collected on the State plans for financing pupil transportation in the five Great Lakes States and analyzed in terms of the aforementioned characteristics, criteria, and their State aid distribution plans.

In applying this technique certain generalizations were noted concerning the characteristics of, and the criteria for evaluating State plans which could aside from the findings summarized below also prove helpful in appraising State plans.

Summary of the Findings

1. State plans for financing pupil transportation can be

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2. The fifty States
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3. Each State has
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profitably analyzed in terms of: (a) their characteristics, (b) the twelve evaluating criteria, and (c) their distribution plans for allocating transportation aid.

2. The fifty State plans for financing pupil transportation do recognize by various means and to varying degrees the twelve evaluating criteria that a majority of the fifty State directors generally agree should be recognized in any adequate State plan.
3. Each State has a unique problem with respect to the development of its State plan for financing pupil transportation. Consequently, it is questionable whether any one plan or formula could completely meet the need of each of the fifty States.
4. Various methods are employed by the fifty States in allocating State aid support for pupil transportation. Different approaches to the problem may well strengthen the evolutionary process since diversity provides for broad experimentation that is essential in developing more equitable methods of financing pupil transportation.
5. There are definite limits to the use of complicated formulas. It would be impractical, if not impossible, to combine all factors affecting the cost of transportation into a State aid formula. Most recent studies have been directed toward the developing of school transportation formulas of relatively simple design.

6. Current, reliable
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7. Procedures ensuring
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6. Current, reliable, and reasonably detailed school transportation cost data are essential to the development and maintenance of an objective and equitable State aid formula.
7. Procedures employed to promote safety, efficiency, adequacy, and economy in the operation of school transportation must be based upon a sound philosophy of the social and educational role of pupil transportation. State plans for financing pupil transportation should encourage and support this philosophy.

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1965

AN ANALYSIS

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Department.

AN ANALYSIS OF STATE PLANS FOR FINANCING

PUPIL TRANSPORTATION

By

John B. Murray

A THESIS

Submitted to
Michigan State University
in partial fulfillment of the requirements
for the degree of

DOCTOR OF EDUCATION

Department of Administration and Higher Education

1964

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ACKNOWLEDGMENTS

The author wishes to express appreciation for the guidance, patience, and encouragement extended by his major advisor, Dr. William H. Roe, and the other members of the doctoral committee, Dr. Julius E. Barbour, Dr. Archie O. Haller, and Dr. John E. Jordon. The author is also indebted to innumerable colleagues and friends for assistance and encouragement. Finally, the author is particularly grateful to the fifty State directors of school transportation, for without their help and cooperation this study would not have been possible.

ACKNOWLEDGMENTS .

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¹United States
Investment in Public
Education, 1954).

CHAPTER I

INTRODUCTION

Education [is] an investment in people.¹ The acceptance of this premise by the American people and this Nation's longstanding democratic commitment to preserve and perpetuate "the worth of the individual" precipitated to no small degree our emphasis upon the establishment of adequate educational opportunities for "all the people." This national commitment, in turn, accounts in major part for the gradual broadening and improvement of State financial support for education during the twentieth century. Although this commitment has not yet resulted in the full attainment of adequate and equal educational opportunity for all, the trend toward this end, as reflected in the general strengthening of State finance support programs for education, is quite obvious.

Education provides the most effective means by which a Nation and its people can meet their changing needs. If one accepts this, it is reasonable to conclude that State financial support programs for education, both

¹United States Chamber of Commerce, Education--An Investment in People (Washington: Government Printing Office, 1954).

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general and for such special purposes as pupil transportation, will of necessity be changed or modified at frequent intervals. Change merely for change's sake, however, seldom brings about sound solutions or lasting progress. The continued improvement of State financial support programs for education depends, in large part, upon sound research. Of particular importance is the systematic collection, compilation, analysis, and evaluation of a comprehensive body of knowledge on the various elements, principles, and practices incorporated in the several types of general- and special-purpose State aid programs and their interrelationships.

State programs for financing pupil transportation in the fifty States and the over-all relationship of these programs to other State aid allocations currently represents an area in need of further research and study. Since 1869 when the legislature of the Commonwealth of Massachusetts first authorized the expenditure of public funds for the daily transportation of pupils, the States have gradually accepted some responsibility for pupil transportation. At the present time State funds are made available for pupil transportation purposes in a vast majority of the States. The tremendous growth in school transportation since the close of World War II, plus the fact that more and more of the cost of this service is being provided from State funds, has focused particular attention in the last few years on State plans for

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financing pupil transportation and their relationship to other State aid programs. State education agencies which administer the State aid programs for financing pupil transportation have very little current research available to guide them. There is no single source which summarizes in adequate detail the current State aid plans and formulas used by the States to distribute State aid funds for pupil transportation. Furthermore, nowhere is there available a current analysis of these State plans in terms of their over-all characteristics or on the basis of a set of generally acceptable criteria. It is hoped that this study will, at least in part, fill this need. The primary focus of this study, however, will not be in evaluating the possible strengths and/or weaknesses of particular State plans, but rather in determining whether or not State plans can be profitably analyzed using the particular approach developed in this study, thus providing a possible pattern for further studies of this type.

The Problem

Statement of the problem.--The purposes of this study are to:

- A. Identify and analyze the common characteristics of State plans for financing pupil transportation in the fifty States;
- B. Ascertain the current status of certain previously

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- C. Analyze in detail the State aid plans for financing pupil transportation in the five Great Lakes States of Michigan, Illinois, Indiana, Ohio, and Wisconsin, specifically in terms of:

the statutory basis, the relationship of State transportation aid to the total State program, the State aid distribution plan (formulas) for allocating pupil transportation aid, and in relation to the aforementioned characteristics and criteria; and

- D. Evolve on the basis of this analysis recommendations for the possible improvement of State plans for financing pupil transportation in the United States.

Significance of the study.--It is not always feasible or educationally sound to maintain schools in the immediate vicinity or within walking distance of all children. It was recognized at a relatively early period in the development of public education in the several States that some children who lived great distances from the nearest school would have to be transported to and from school if all children were to be afforded educational opportunities.

The degree to which publicly supported pupil transportation has been accepted and the impact that this service has had on our system of public elementary and secondary education in the United States become obvious

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when we look at the growth of this service over the past thirty years. In 1925-26, about 1,100,000² elementary and secondary pupils were transported to and from school in the United States at a public cost of about \$35,600,000. By 1957-58, we were transporting more than eleven million pupils at a cost to the taxpayer (not including capital outlay) of more than \$419 million.³

During the 1962-63 school year, we transported over fourteen million pupils. This year we will transport an estimated 15.5 million pupils at an estimated cost of approximately \$600 million. Expenditures for school transportation, therefore, must be seriously considered by any district that transports children to school in analyzing its annual operating budget. Inasmuch as the same factors which caused pupil transportation services to grow are still in operation, in addition to a number of new factors which have emerged in recent years, this service will probably continue to increase. By 1965-66 we well may be called upon to transport over sixteen million pupils daily to and from school and to expend for this service (not including capital outlay) an estimated

²David T. Blose, "Some Consolidation Statistics," School Life, April 1936.

³John B. Murray, "Statistics on Pupil Transportation, 1961-62," United States Office of Education, OE20022-62 (Washington: Government Printing Office, 1963). Growth of pupil transportation in the United States based on annual statistical reports published in this series and on projections prepared by reference estimates and projections section of U. S. Office of Education.

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\$700 million. In other words, if the present rate of growth continues, we can expect to be transporting more than 500,000 additional pupils each year in the years immediately ahead.⁴

Providing bus transportation for students has become a problem in many local school districts, especially in those districts where increasing demands for expanded and improved services cannot be met without substantially increasing the cost of education.⁵ School authorities in these districts are caught on the horns of dilemma. On one hand, they are confronted with the constant and ever-increasing demand for expanded and improved school transportation services. On the other hand, they know only too well that excessive expenditures for school transportation can drain needed funds away from the instructional program. The demand for pupil transportation services is increasing as a consequence of: the phenomenal growth of our suburban areas, school district reorganization, the increased demand by school patrons for better or expanded services (school patrons are requesting transportation services today, not only on the basis of such long-accepted factors as distance,

⁴Ibid.

⁵The term "school district" refers to that administrative unit at the local level which exists primarily to operate schools or to contract for school services, or a geographical area which for specific school purposes is under the supervision or control of a single board of education and/or administrative officer.

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population sparsity, and educational opportunity, but because of factors often directly or indirectly related to urban traffic problems, and often, it seems, because of an apparent aversion our society seems to hold against walking whenever it is possible to ride), and finally increased annual school enrollments--generally estimated to be 46.2 million by 1970 (a frightening figure when one realizes that currently approximately two children in every five attending public elementary and secondary schools were transported by their school districts last year).

A number of States are currently confronted with the need of developing a more scientific and equitable method of allocating State funds for pupil transportation. Education is a function of the State, and it is the obligation of the State to see that school facilities are within reach of every child. Since it is generally agreed that a better job of providing education for children can be done when they are congregated in larger groups, providing transportation service is essential. States cannot rid themselves of the obligation to provide this service simply by delegating it to local units. It is a State's responsibility in many respects. One of the most pressing aspects of this responsibility, however, is that of financing the service.

Hypothesis.--(1) The State plans for financing pupil transportation can be profitably analyzed in terms of certain selected characteristics and criteria,

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Assumptions

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(2) recommendations can be evolved through this process which will contribute to improvement of State plans for financing pupil transportation, and (3) this particular method of analysis can provide a possible pattern for further studies of this type.

Assumptions.--This study is predicated in part on the following assumptions: (1) that the fifty State directors of pupil transportation will generally agree that certain criteria should be incorporated in any State plan for financing pupil transportation, and (2) that the fifty State plans for financing pupil transportation do currently recognize in a number of ways and to varying degrees certain criteria that the fifty State directors of pupil transportation will generally agree should be recognized in any adequate State plan.

Procedure, technique, and data.--

Certain basic data were collected on the State plans for financing pupil transportation in the five Great Lakes States of Michigan, Illinois, Ohio, Indiana, and Wisconsin⁶ and organized to indicate the statutory basis, the relationship of State transportation aid to the total State aid program, and the distribution plan (including formulas) for allocating State transportation aid in these States.

The identification and analysis of the current characteristics of State plans for financing pupil

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A number of important considerations or criteria representing basically those developed by Covert in 1946⁸ for evaluating State plans for financing pupil transportation were submitted to the fifty State directors of pupil transportation for evaluation in order to determine the current status of these criteria.⁹

The five State plans were then analyzed in terms of the aforementioned characteristics and criteria.

As a result of this analysis, a number of recommendations evolved for the possible improvement of State aid plans for financing pupil transportation in the United States.

Limitations.--A complete and comprehensive study involving all of the financial implications of pupil transportation in the United States has many ramifications and is beyond the scope of any one study such as this. It is recognized that a close relationship exists between State and local support and the administration, organization, and operation of pupil transportation programs in

⁷Appendix B.

⁸Timon Covert, State Plans for Financing Pupil Transportation, Federal Security Agency, United States Office of Education, Pamphlet No. 99 (Washington: Government Printing Office, 1946).

⁹Appendix C.

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the fifty States. These considerations, however, and others such as school district reorganization and the responsibilities and services of State departments of education in pupil transportation will not, except in a very cursory manner, be pursued in this study. This study will consider only the financial aspects of various State plans for financing pupil transportation in the United States.

Furthermore, this study is confined primarily to the collection, organization, and analysis of certain basic data pertaining to the State plans for financing pupil transportation in the five Great Lakes States of Michigan, Illinois, Ohio, Indiana, and Wisconsin, with only a brief analysis of the remaining State plans in terms of whether or not State plans are a part of the foundation program, the basis for allocating State aid funds for school transportation, factors incorporated in the State aid formula for determining the transportation needs of local school units, and the requirements to qualify for State funds for transportation.

Definition of Terms

A number of terms which are used throughout this study are defined as follows:

Pupil transportation.--The transportation of pupils to and from school and to authorized school activities and/or functions.

State plan for financing pupil transportation.--The

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statutory basis, the administrative rules and regulations including the requirements to qualify, and the method (including formulas) normally taken into consideration by a particular State in the allocation of State transportation aid.

Basic administrative unit.--The administrative unit at the local level which exists primarily to operate schools or to contract for school services. Normally, taxes can be levied against such units for school purposes. These units may or may not be coterminous with county, city, or town boundaries.

Operating costs.--All costs (excluding capital outlay) pertaining to the operation, maintenance, inspection, and supervision of school transportation programs.

Maintenance costs.--All cost involving the maintenance or upkeep of school buses. (This item could in some cases include certain expenditures involved in the maintenance and operation of school bus garages.)

Capital outlay.--The nonoperative expenses of pupil transportation, which normally include the cost of school buses, school bus garages, and such other tools and equipment as are associated with the school bus transportation program.

School bus depreciation.--(1) The decrease in value of a bus as a result of age, miles of operation, or other factors; (2) A planned devaluation of the bus so that the investment in the vehicle will reach a zero

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School bus.--A vehicle with a manufacturer's rated seating capacity of twelve or more. (Seating capacity figured on the basis of at least thirteen inches of seat space per pupil.)

Other vehicles.--Vehicles such as station wagons, cars, and carryalls normally having a manufacturer's rated seating capacity of less than twelve (figured on the basis of not less than thirteen inches of seating space per pupil).

State statutory provisions.--Provisions included in legislative acts passed by State legislatures.

Permissive legislative provisions.--Legislative provisions granting school districts the power to act but not compelling action (enabling powers).

Mandatory legislative provisions.--Legislative provisions imposing an absolute and unequivocal obligation to act.

State aid allocation.--The allocation and/or distribution of financial grants by the State to local school administrative units for the support of education.

Privately operated school transportation.--A plan under which a school bus is owned and operated by an individual or corporation rather than by the public school district.

Publicly operated school transportation.--A plan

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State aid program.--The over-all State plan for financial assistance by the State to local or intermediate school administrative units for the support of an education program.

State transportation aid.--Financial aid granted by a State, amounting to all or a portion of the cost, to school districts for the purpose of transporting pupils.

The foundation program.--(1) A term used by authorities in school finance to describe the minimum program of education that should be accepted as a basis for equalization in a State aid or Federal aid program; (2) the basic educational program that should be guaranteed under the State or Federal program of school support; and (3) a given expenditure in dollars per weighted student or classroom unit per year accepted as a minimum in a State aid or Federal aid program.

General-purpose State aid grants and/or allocations.--State aid allocations distributed to all school systems within a given State in support of a basic program of education. These funds are normally allocated with little instruction as to their use at the local level and may normally be expended for all the purposes for which boards of education may legally expend funds.

Special-purpose State aid grants and/or allocations.--State aid allocations which restrict the use of

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the funds to certain specific items in the school budget, to a particular portion of the school program, or to certain specific school districts or kinds of school districts which the legislature may determine are entitled to special support funds.

Flat State aid grants and/or allocations.--State distributions which are allotted to school districts in proportion to or normally on the basis of certain factors inherent in the program such as the number of pupils, teachers, classrooms, miles, buses, etc. No estimate of the financial ability of the school district is normally used in calculating the amount of flat grant allocation for a particular school district.

Equalizing State aid grants and/or allocations.--State distributions which, although certain program factors may be taken into account as in flat grant distribution, also provide for certain adjustments relative to the financial abilities of school districts within the State. Under these distributions school districts that are able to provide more local revenue by a given standard tax rate normally receive proportionately smaller amounts of State money than do school districts which are less able on the same basis to pay for the same program of school services. In addition to the classification of distributions by two kinds of purposes, general and special, and by the two kinds of methods, flat grant and equalizing, combinations of purpose and method yield four other classes of funds. There are: general-purpose flat

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grants, general-purpose equalizing grants, special-purpose flat grants, and special-purpose equalizing grants.

Assessed valuation.--The value placed on a building or other place of real property for purposes of taxation.

Local tax levy.--A tax levied by a local administrative unit of government such as a school district as distinguished from a State or Federal unit.

Average daily attendance (ADA).--A statistic computed by the formula: the sum of the days attended by each student enrolled divided by the number of days school is in session; this statistic is usually figured for the period of one school year.

Average daily membership and/or enrollment (ADM or ADE).--The aggregate of the daily membership for the school year divided by the actual number of days school was in session.

The State aid formula.--The mathematical procedure employed to calculate the State aid allowance made available to local school districts for approved educational programs and/or services. The State aid formula for determining pupil transportation allowances, for example, may recognize one or more factors such as the financial ability and effort of local school districts, number of pupils transported, density and sparsity factors, miles the school buses are operated, expenditures for equipment or allowances for depreciation, drivers'

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salaries, and numerous other factors which may be specified in the State statutes and/or administrative rules and regulations of the particular State educational agency involved.

State aid allowance.--The amount of financial assistance the local school district may be eligible to receive from the State in support of an educational program and/or service.

Organization of Remainder of the Study

Chapter II will consist of a review of the related literature in terms of the major research and important developments which have had a reasonably direct relationship to State plans for financing pupil transportation, including studies, books, periodicals, and pamphlets which deal specifically with State aid plans and formulas for financing pupil transportation in the United States. This chapter also presents a historical review of the development of financial support programs for pupil transportation in the United States.

Chapter III will contain an identification and analysis of the current characteristics of State plans for financing pupil transportation in the fifty States.

Chapter IV will contain a summary of the current status of certain criteria for evaluating State plans for financing pupil transportation.

Chapter V will consist of the presentation and

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analysis of State plans for financing pupil transportation in the five Great Lakes States of Michigan, Illinois, Indiana, Ohio, and Wisconsin in terms of (1) the statutory basis, the relationship of State transportation aid to the total State aid program, and the distribution plan (including formulas) for allocating State transportation aid, and (2) the aforementioned characteristics and criteria.

Chapter VI will contain a summary of the study followed by recommendations and conclusions.

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CHAPTER II

THE EVOLUTION OF FINANCIAL SUPPORT PROGRAMS FOR PUPIL TRANSPORTATION

The subject of public school finance in its very broadest sense permeates the literature of educational administration. Any attempt to review all the research conceivably related to this study would not only be impractical but, in a real sense, inappropriate. This chapter focuses basically upon the research which has a reasonably direct relationship to State plans for financing pupil transportation. It provides an analysis of the studies, books, periodicals, and pamphlets which have dealt generally with State aid programs and specifically with State aid plans and formulas for financing pupil transportation.

This review, furthermore, will concern itself with the historical development of pupil transportation in the United States only as it may relate to the development of State aid plans and formulas for financing school transportation and then only to the degree necessary to fix this study in its appropriate historical perspective.

The Early Period--1840-1869

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educational opportunities should be available to all children slowly but persistently evolved in this country. "There is firm evidence that quest for improvement of educational opportunity of children, regardless of their geographical location, is even older than our Constitution."¹

Schoolmen discovered very early that it was not always feasible nor educationally sound to locate schools within walking distance of the children they were to serve. As early as 1838, Horace Mann pointed out this educational dilemma on the American scene when he said, "In attempting to accommodate all with a school house nearby, the accommodation is substantially destroyed. In many cases, the pursuit of the incident works forfeiture on the principle."² While it was recognized quite early that many children would need some kind of transportation to and from school, until relatively recent time it was commonly held that public funds should not be used to provide transportation services.

Massachusetts was the first State to authorize pupil transportation at public expense by law. In 1869 the Massachusetts legislature passed an Act authorizing

¹National Education Association, Department of Rural Education, Pupil Transportation, Yearbook 1953 (Washington: Department of Rural Education, 1953), p. 32.

²Austin R. Meadows, Safety and Economy in School Transportation (Wetumpka, Alabama: Wetumpka Printing Co., 1940), p. 12.

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local communities in that State to levy taxes for the support of school transportation services. The following copy of this Act, with comments, was published in the Thirty-third Annual Report of the Massachusetts Board of Education.

[Chapter 132]

An Act relating to the Conveying of Children to and from the Public Schools. Be it enacted, etc., as follows:

SECT. 1. Any town in this commonwealth may raise by taxation or otherwise, and appropriate money to be expended by the school committee in their discretion, in providing for the conveyance of pupils to and from the public schools.

SECT. 2. This act shall take effect upon its passage. [Approved April 1, 1869.]

This Act was introduced into the legislature through the efforts of a practical man from one of our rural towns of large territory and sparse population, where the constant problem is, how to bring equal school privileges to all without imposing undue taxation.

In too many cases the towns seem to have forgotten that the most important element in the solution of the problem has been the character of the school, and have bent their efforts to making them accessible to all. This has led to such an unwise multiplication of them, as not only to shorten the time of their continuance, but greatly to diminish their efficiency, while at the same time the expense of maintaining them has been largely enhanced.

The Act recognizes the fact that it is a far better policy for the town to spend a few dollars in conveying in severe and stormy weather and through drifts of snow, children who have no means of conveyance to a well appointed and good school, rather than to waste hundreds in planting small and feeble schools at their doors.

I have little doubt that the future history of not a few of them will amply justify the wisdom of the grant.

It is to be remembered that the law is not compulsory. It simply gives the power to the towns, whose citizens are amply qualified to judge as to the propriety of exercising it. Certainly there is little danger of its abuse.

The following paragraph of a business letter to this office, written by the chairman of the school

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committee of an important town in Worcester County, shows what has already been accomplished by the aid of this Act and of the Act to abolish the school district system, and is a sufficient reply to the sneering criticism to which it has been exposed in high quarters:--

"We have been consolidating and grading since spring. Instead of eleven schools of the old six months' grade, we have now five primary and two grammar, and shall be able to keep at least eight months this year, with no addition to the appropriation, though we pay better wages, and transport the children in two districts, at an expense of ten dollars per week."³

Several towns in Massachusetts took advantage of the provisions of this Act soon after its passage. The records of the town of Greenfield show that three small schools were united in 1869 and "a savings of \$175 accomplished after paying \$127.50 for conveyance of pupils."⁴

One of the first documented instances of the operation of a publicly supported pupil transportation program occurred somewhat later in Quincy, Massachusetts, 1874-75.⁵

By 1893, 120 towns and cities in Massachusetts reported that they were paying for the conveyance of

³Thirty-third Annual Report of the Board of Education, together with the Thirty-third Annual Report of the Secretary of the Board. Commonwealth of Massachusetts (Boston: Wright and Potter, 1870), p. 107. This reference, rather than Chapter 132, Public Laws, Massachusetts, 1869, is cited because of the discussions of the Act which are embodied in the report.

⁴Bulletin of the Department of Education, No. 6 (Boston: State Department of Education, 1920), p. 8.

⁵Addresses and Proceedings of the National Education Association, 1897, pp. 515-516.

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approximately 2,000 pupils to and from school.⁶ School transportation services had made it possible for these towns and cities to close 250 outlying schools over a twelve-year period.

The Service Wins Acceptance--1870-1920

Other New England States soon followed Massachusetts' lead in accepting pupil transportation as a public responsibility. In 1876 Vermont enacted a statute giving school districts the permissive authority to transport pupils. Maine followed in 1880 by permitting districts to close schools and spend money for transportation. Within a few years, official reports of State departments of education indicate that in at least four States, school districts had reported expenditures of public funds for pupil transportation: New Hampshire, 1885; Massachusetts, 1889; Vermont, 1894; and Connecticut, 1893.

Table 1, which is reproduced from the 1902 Report of the Commissioner of Education, indicates the amounts expended for transportation by local school districts in five States for the school years 1888-89 to 1901-12, while Table 2 indicates the average per pupil cost in two States during this same period.

⁶J. F. Abel, Consolidation of Schools and Transportation of Pupils, Bureau of Education, United States Department of the Interior, Bulletin No. 41 (Washington: Government Printing Office, 1923), p. 13.

TABLE 1.--The per cent of the total amount expended for pupil transportation in 5 New England States between 1900-01 and 1901-02

School year	Maine		Vermont		Massachusetts		Connecticut		New Jersey	
	Expended for trans- portation	Per cent of total	Expended for trans- portation	Per cent of total	Expended for trans- portation	Per cent of total	Expended for trans- portation	Per cent of total	Expended for trans- portation	Per cent of total

TABLE 1.--The per cent of the total amount expended for pupil transportation in 5 New England States between 1888-89 and 1901-02

School year	Maine		Vermont		Massachusetts		Connecticut		New Jersey	
	Expended for transportation	Per cent of total	Expended for transportation	Per cent of total	Expended for transportation	Per cent of total	Expended for transportation	Per cent of total	Expended for transportation	Per cent of total
1888-89	-----	----	-----	----	\$ 22,118	.29	-----	----	-----	----
1889-90	-----	----	-----	----	24,145	.29	-----	----	-----	----
1890-91	-----	----	-----	----	30,649	.36	-----	----	-----	----
1891-92	-----	----	-----	----	38,726	.42	-----	----	-----	----
1892-93	-----	----	-----	----	50,590	.52	-----	----	-----	----
1893-94	-----	----	-----	----	63,618	.64	-----	----	-----	----
1894-95	-----	----	\$12,941	1.41	76,608	.72	-----	----	-----	----
1895-96	\$47,739	2.91	18,429	1.73	91,136	.77	-----	----	-----	----
1896-97	28,818	1.81	18,521	2.04	105,317	.85	-----	----	-----	----
1897-98	38,961	2.41	18,306	1.96	123,032	.90	\$11,416	.38	-----	----
1898-99	50,118	3.20	20,881	2.14	127,409	.92	10,752	.34	-----	----
1899-1900	51,050	2.98	26,492	2.47	141,754	1.03	9,817	.31	-----	----
1900-01	54,037	3.13	32,034	2.90	151,773	1.07	12,838	.38	\$4,421	.06
1901-02	62,179	3.46	36,563	3.34	165,597	1.09	-----	----	6,435	.09

Source: The Consolidation of Schools and the Transportation of Pupils. United States Bureau of Education (Washington: Government Printing Office, 1904), p. 2353. Reprint of Chapter III of the Report of the Commissioner of Education for 1901 and of a Portion of Chapter LIII, Report for 1902.

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TABLE 2.--Amount expended per pupil transported in Vermont and Connecticut between 1894-95 and 1901-02¹

School year	Vermont		Connecticut	
	Number of pupils transported	Average cost	Number of pupils transported	Average cost
1894-95	921	\$14.05	-	-
1895-96	1,347	13.68	-	-
1896-97	1,309	14.15	-	-
1897-98	1,574	11.15	849	\$13.45
1898-99	1,652	12.64	773	13.91
1899-1900	2,062	12.85	639	15.36
1900-01	2,540	12.61	780	16.46
1901-02	2,517	14.53	-	-

¹The Consolidation of Schools and the Transportation of Pupils, United States Bureau of Education (Washington: Government Printing Office, 1904), p. 2353. Reprint of Chapter III of the Report of the Commissioner of Education for 1901 and a portion of Chapter LIII, Report for 1902.

From the New England States the trend toward publicly supported pupil transportation slowly spread westward. Certain local school boards in Indiana were providing transportation at public expense without expressed statutory authority in 1888 and possibly even earlier. Transportation was generally considered as a key to school district reorganization in Ohio as early as 1893.

The following report by O. J. Kern, Superintendent of Winnebago County, Illinois Schools, describes a visit

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to one of the newly centralized school systems in northeastern Ohio and points out the status of the transportation movement in the Midwest in the fall of 1900.

So we drove on to North Madison, in Madison Township where three wagons are used. On our way there we saw the first wagon. We stopped at the farmhouse and talked with the driver. He carried all the children from one district, about twenty in number. His route was 5 miles long. That is to say, starting at the first home to pick up a child until he arrived at the central school was 5 miles. Then he drove back home after delivering the children, thus covering 10 miles in the morning. Of course, he traveled the same ground after school, thus making 20 miles in all. He got \$1.20 a day for his work. We asked him if he made any money at it. He said he did, as he was working a small farm that did not require all the time and labor of himself and team. We asked him if he had any trouble with the children and he replied none. He said he was employed by the township board of education, who put him under bond to be careful with the children; to have a safe team; to provide a suitable wagon, covered and provided with curtains, containing soapstones and lap robes for the severest weather. We asked what objections the parents along the route had to the new plan. His reply was that the only objection was on the part of two or three at the beginning of the route, as they had to get their children ready somewhat earlier than they used to when they went to the district school. Of course, the children must be ready when the wagon came. He aimed to start at 7:30 and arrive at the building not later than 8:45. Thus, there were no children tardy; none came with wet feet or clothing; the attendance was greatly increased and much more regular. The driver believed the movement had come to stay; that the people would not consent to go back to the old way . . .⁷

Between 1894 and 1910, twenty-five States enacted laws that provided for the use of public funds for pupil transportation, and by 1910, fourteen States were reporting local expenditures for pupil transportation as a separate

⁷Ibid., pp. 161-62.

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item. By 1920, all of the forty-eight States then existing had enacted legislation authorizing pupil transportation. Delaware in 1919 was the last to do so.

Table 3 indicates the status of pupil transportation in the United States by 1920.⁸

In spite of the fact that by 1920 over \$14 million was being expended annually for pupil transportation in the United States, the service was commonly regarded as a local responsibility to be financed entirely by the local school districts. Nonetheless, a trend toward providing State aid for pupil transportation was evident. Connecticut, New Jersey, Vermont, and Wisconsin had been providing State aid for pupil transportation prior to 1910. By 1922 at least twenty States were providing some type of special aid for pupil transportation. Thus, in the 1920's, the belief that the State should contribute to the support not only of such direct educational activities of instruction as teachers' salaries but of certain indirect activities that contributed to the over-all educational program was quite firmly established.

The Emerging State Aid Programs of the 1920's

The conflicting theories prevalent in the 1920's relative to the purpose of State aid for education must be reviewed prior to any consideration of the problems raised in providing State aid for pupil transportation

⁸Ibid., p. 58.

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TABLE 3.--Transportation of pupils, 1920

States	Date of first transportation law	Date of first available data on amount spent for transportation	First reported amount spent for transportation	Amount spent for transportation in 1920	Per cent of total current expense of the schools	Number of children transported, 1920	Per cent of the average daily attendance of the State	Per cent of total enrollment in consolidated schools	Cost of transportation per pupil per year
1	2	3	4	5	6	7	8	9	10
Continental United States	----	----	----	\$11,511,511	1/1.8	356,401	2/5.6	----	----
Alabama . . .	3/1915	4/1916	\$ 9,770	171,925	2.2	7,058	1.9	19	5/3.33
Arizona . . .	1912	----	----	----	----	----	----	----	----
Arkansas . . .	1911	----	----	----	----	1,032	.3	----	----
California . .	1901	1918	272,782	630,797	1.6	----	----	----	----
Colorado . . .	1909	----	----	----	6/11.400	11,400	7.5	39.3	----
Connecticut . .	1893	1898	11,416	314,340	2.2	6,030	2.9	----	----
Delaware . . .	1919	1920	68,401	71,444	4.6	----	----	----	----
Florida . . .	8/1889	1901	3,225	216,691	3.6	7,966	4.8	----	27.20
Georgia . . .	1911	1911	19,339	69,477	.8	9,499	2.03	52.4	12.10
Idaho . . .	1913	1914	35,000	301,345	4.5	1,526	1.8	----	----
Illinois . . .	1911	1912	16,987	163,254	.2	----	----	----	----
Indiana . . .	2/1899	1904	590	1,921,035	6.6	60,142	13.1	----	----
Iowa . . .	1897	1907	25,758	1,354,051	4.1	7/34,743	8.5	50.6	----
Kansas . . .	1899	----	----	----	----	4,000	1.3	33.7	10/.16-0.23
Kentucky . . .	1912	1914	15,222	95,785	1.3	----	----	10/.10-.19	----
Louisiana . . .	11/1916	1909	45,808	471,059	5.1	18,229	7.1	16.9	26.00
Maine . . .	1880	1896	47,739	296,651	4.9	8,809	7.6	----	33.37
Maryland . . .	1904	1905	12,509	64,734	.8	----	----	----	----
Massachusetts .	1869	1889	22,118	856,840	2.1	13/25,935	5.0	10/.20-.24	----
Michigan . . .	1903	1914	49,497	155,116	.4	----	----	----	----
Minnesota . . .	1901	1904	4,258	976,475	3.4	7/20,450	5.1	----	----
Mississippi . .	1910	1911	2/345	246,078	5.5	30,772	11.8	49.7	5/3.18
Missouri . . .	1907	----	----	----	----	----	----	----	----
Montana . . .	1903	1914	26,636	297,796	2.9	3,293	3.5	27.1	10/.33
Nebraska . . .	1897	1920	----	127,500	.7	7/3,517	1.5	----	----
Nevada . . .	1915	1920	----	34,115	2.8	----	----	----	----
New Hampshire .	1885	1906	36,527	195,127	5.3	----	----	----	----
New Jersey . .	1895	1901	4,421	749,895	2.1	21,727	4.5	----	----
New Mexico . .	11/1917	1918	20,855	136,881	3.8	5,119	8.6	----	----
New York . . .	1896	1913	65,445	470,485	.4	----	----	----	----
North Carolina .	1911	----	----	----	----	7,936	1.6	----	----
North Dakota .	1899	1906	28,896	876,876	7.0	21,153	16.4	----	----
Ohio . . .	1894	1915	473,470	1,651,157	2.9	----	----	----	----
Oklahoma . . .	1905	1920	----	15/228,397	1.2	8,420	2.3	----	10/.35
Oregon . . .	1903	1920	----	2,286	.02	7/2,029	1.4	----	----
Pennsylvania . .	1897	1913	425	83,962	.1	7/4,520	.35	----	----
Rhode Island . .	1916	1916	21,633	32,490	.7	----	----	----	17/13.29
South Carolina .	16/1912	1914	11,927	17/25,121	.4	17/1,723	.51	----	----
South Dakota . .	1899	1913	54,399	211,947	2.3	2,388	2.4	27	5/1.00-9.00
Tennessee . . .	1913	1915	18,920	88,883	1.4	5,870	1.2	----	----
Texas . . .	18/1915	1917	29,631	70,088	2.2	2,683	.3	----	----
Utah . . .	19/1905	1916	93,091	170,286	.7	5,000	5.1	----	----
Vermont . . .	1876	1893	9,133	228,532	6.5	4,467	8.8	----	----
Virginia . . .	1903	1906	2,102	153,796	1.5	7/8,885	2.5	----	----
Washington . . .	1901	20/1911	20/44,523	----	----	----	----	----	----
West Virginia .	1908	----	----	----	----	----	----	----	----
Wisconsin . . .	1897	1912	36,468	225,699	.9	----	----	----	----
Wyoming . . .	21/1919	1918	29,255	74,128	2.3	----	----	----	----

1/Computed on returns of 40 States.

2/Computed on returns from 31 States.

3/Permitted in Mobile County at an earlier date.

4/Mobile County only.

5/Per month.

6/Estimated.

7/Data for 1921.

8/Assumed in powers of county boards.

9/Transportation was carried on under general powers of township boards as early as 1888.

10/Per day.

11/Transportation also dates to 1902 under general powers of parish boards.

12/Baltimore County.

13/Data for 1919.

14/Not a specific authorization. County boards created.

15/Special report for 98 schools.

16/Permitting State aid for transportation.

17/Data for 1918.

18/A law of 1905 was also construed as permitting transportation.

19/In powers of county district board.

20/Special report.

21/Not specific; assumed in powers of district board.

Source: J. F. Abel, Consolidation of Schools and Transportation of Pupils. Bureau of Education, United States Department of the Interior, Bulletin No. 41 (Washington: Government Printing Office, 1923), p. 58.

State	Date of first appearance	Date of second appearance	Date of third appearance	Date of fourth appearance	Date of fifth appearance	Date of sixth appearance	Date of seventh appearance	Date of eighth appearance	Date of ninth appearance	Date of tenth appearance	Date of eleventh appearance	Date of twelfth appearance	Date of thirteenth appearance	Date of fourteenth appearance	Date of fifteenth appearance	Date of sixteenth appearance	Date of seventeenth appearance	Date of eighteenth appearance	Date of nineteenth appearance	Date of twentieth appearance	Date of twenty-first appearance	Date of twenty-second appearance	Date of twenty-third appearance	Date of twenty-fourth appearance	Date of twenty-fifth appearance	Date of twenty-sixth appearance	Date of twenty-seventh appearance	Date of twenty-eighth appearance	Date of twenty-ninth appearance	Date of thirtieth appearance	Date of thirty-first appearance	Date of thirty-second appearance	Date of thirty-third appearance	Date of thirty-fourth appearance	Date of thirty-fifth appearance	Date of thirty-sixth appearance	Date of thirty-seventh appearance	Date of thirty-eighth appearance	Date of thirty-ninth appearance	Date of fortieth appearance	Date of forty-first appearance	Date of forty-second appearance	Date of forty-third appearance	Date of forty-fourth appearance	Date of forty-fifth appearance	Date of forty-sixth appearance	Date of forty-seventh appearance	Date of forty-eighth appearance	Date of forty-ninth appearance	Date of fiftieth appearance	Date of fifty-first appearance	Date of fifty-second appearance	Date of fifty-third appearance	Date of fifty-fourth appearance	Date of fifty-fifth appearance	Date of fifty-sixth appearance	Date of fifty-seventh appearance	Date of fifty-eighth appearance	Date of fifty-ninth appearance	Date of sixtieth appearance	Date of sixty-first appearance	Date of sixty-second appearance	Date of sixty-third appearance	Date of sixty-fourth appearance	Date of sixty-fifth appearance	Date of sixty-sixth appearance	Date of sixty-seventh appearance	Date of sixty-eighth appearance	Date of sixty-ninth appearance	Date of seventieth appearance	Date of seventy-first appearance	Date of seventy-second appearance	Date of seventy-third appearance	Date of seventy-fourth appearance	Date of seventy-fifth appearance	Date of seventy-sixth appearance	Date of seventy-seventh appearance	Date of seventy-eighth appearance	Date of seventy-ninth appearance	Date of eightieth appearance	Date of eighty-first appearance	Date of eighty-second appearance	Date of eighty-third appearance	Date of eighty-fourth appearance	Date of eighty-fifth appearance	Date of eighty-sixth appearance	Date of eighty-seventh appearance	Date of eighty-eighth appearance	Date of eighty-ninth appearance	Date of ninetieth appearance	Date of ninety-first appearance	Date of ninety-second appearance	Date of ninety-third appearance	Date of ninety-fourth appearance	Date of ninety-fifth appearance	Date of ninety-sixth appearance	Date of ninety-seventh appearance	Date of ninety-eighth appearance	Date of ninety-ninth appearance	Date of one hundredth appearance																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																						
Alabama	1901	1902	1903	1904	1905	1906	1907	1908	1909	1910	1911	1912	1913	1914	1915	1916	1917	1918	1919	1920	1921	1922	1923	1924	1925	1926	1927	1928	1929	1930	1931	1932	1933	1934	1935	1936	1937	1938	1939	1940	1941	1942	1943	1944	1945	1946	1947	1948	1949	1950	1951	1952	1953	1954	1955	1956	1957	1958	1959	1960	1961	1962	1963	1964	1965	1966	1967	1968	1969	1970	1971	1972	1973	1974	1975	1976	1977	1978	1979	1980	1981	1982	1983	1984	1985	1986	1987	1988	1989	1990	1991	1992	1993	1994	1995	1996	1997	1998	1999	2000	2001	2002	2003	2004	2005	2006	2007	2008	2009	2010	2011	2012	2013	2014	2015	2016	2017	2018	2019	2020	2021	2022	2023	2024	2025	2026	2027	2028	2029	2030	2031	2032	2033	2034	2035	2036	2037	2038	2039	2040	2041	2042	2043	2044	2045	2046	2047	2048	2049	2050	2051	2052	2053	2054	2055	2056	2057	2058	2059	2060	2061	2062	2063	2064	2065	2066	2067	2068	2069	2070	2071	2072	2073	2074	2075	2076	2077	2078	2079	2080	2081	2082	2083	2084	2085	2086	2087	2088	2089	2090	2091	2092	2093	2094	2095	2096	2097	2098	2099	2100	2101	2102	2103	2104	2105	2106	2107	2108	2109	2110	2111	2112	2113	2114	2115	2116	2117	2118	2119	2120	2121	2122	2123	2124	2125	2126	2127	2128	2129	2130	2131	2132	2133	2134	2135	2136	2137	2138	2139	2140	2141	2142	2143	2144	2145	2146	2147	2148	2149	2150	2151	2152	2153	2154	2155	2156	2157	2158	2159	2160	2161	2162	2163	2164	2165	2166	2167	2168	2169	2170	2171	2172	2173	2174	2175	2176	2177	2178	2179	2180	2181	2182	2183	2184	2185	2186	2187	2188	2189	2190	2191	2192	2193	2194	2195	2196	2197	2198	2199	2200	2201	2202	2203	2204	2205	2206	2207	2208	2209	2210	2211	2212	2213	2214	2215	2216	2217	2218	2219	2220	2221	2222	2223	2224	2225	2226	2227	2228	2229	2230	2231	2232	2233	2234	2235	2236	2237	2238	2239	2240	2241	2242	2243	2244	2245	2246	2247	2248	2249	2250	2251	2252	2253	2254	2255	2256	2257	2258	2259	2260	2261	2262	2263	2264	2265	2266	2267	2268	2269	2270	2271	2272	2273	2274	2275	2276	2277	2278	2279	2280	2281	2282	2283	2284	2285	2286	2287	2288	2289	2290	2291	2292	2293	2294	2295	2296	2297	2298	2299	2300	2301	2302	2303	2304	2305	2306	2307	2308	2309	2310	2311	2312	2313	2314	2315	2316	2317	2318	2319	2320	2321	2322	2323	2324	2325	2326	2327	2328	2329	2330	2331	2332	2333	2334	2335	2336	2337	2338	2339	2340	2341	2342	2343	2344	2345	2346	2347	2348	2349	2350	2351	2352	2353	2354	2355	2356	2357	2358	2359	2360	2361	2362	2363	2364	2365	2366	2367	2368	2369	2370	2371	2372	2373	2374	2375	2376	2377	2378	2379	2380	2381	2382	2383	2384	2385	2386	2387	2388	2389	2390	2391	2392	2393	2394	2395	2396	2397	2398	2399	2400	2401	2402	2403	2404	2405	2406	2407	2408	2409	2410	2411	2412	2413	2414	2415	2416	2417	2418	2419	2420	2421	2422	2423	2424	2425	2426	2427	2428	2429	2430	2431	2432	2433	2434	2435	2436	2437	2438	2439	2440	2441	2442	2443	2444	2445	2446	2447	2448	2449	2450	2451	2452	2453	2454	2455	2456	2457	2458	2459	2460	2461	2462	2463	2464	2465	2466	2467	2468	2469	2470	2471	2472	2473	2474	2475	2476	2477	2478	2479	2480	2481	2482	2483	2484	2485	2486	2487	2488	2489	2490	2491	2492	2493	2494	2495	2496	2497	2498	2499	2500	2501	2502	2503	2504	2505	2506	2507	2508	2509	2510	2511	2512	2513	2514	2515	2516	2517	2518	2519	2520	2521	2522	2523	2524	2525	2526	2527	2528	2529	2530	2531	2532	2533	2534	2535	2536	2537	2538	2539	2540	2541	2542	2543	2544	2545	2546	2547	2548	2549	2550	2551	2552	2553	2554	2555	2556	2557	2558	2559	2560	2561	2562	2563	2564	2565	2566	2567	2568	2569	2570	2571	2572	2573	2574	2575	2576	2577	2578	2579	2580	2581	2582	2583	2584	2585	2586	2587	2588	2589	2590	2591	2592	2593	2594	2595	2596	2597	2598	2599	2600	2601	2602	2603	2604	2605	2606	2607	2608	2609	2610	2611	2612	2613	2614	2615	2616	2617	2618	2619	2620	2621	2622	2623	2624	2625	2626	2627	2628	2629	2630	2631	2632	2633	2634	2635	2636	2637	2638	2639	2640	2641	2642	2643	2644	2645	2646	2647	2648	2649	2650	2651	2652	2653	2654	2655	2656	2657	2658	2659	2660	2661	2662	2663	2664	2665	2666	2667	2668	2669	2670	2671	2672	2673	2674	2675	2676	2677	2678	2679	2680	2681	2682	2683	2684	2685	2686	2687	2688	2689	2690	2691	2692	2693	2694	2695	2696	2697	2698	2699	2700	2701	2702	2703	2704	2705	2706	2707	2708	2709	2710	2711	2712	2713	2714	2715	2716	2717	2718	2719	2720	2721	2722	2723	2724	2725	2726	2727	2728	2729	2730	2731	2732	2733	2734	2735	2736	2737	2738	2739	2740	2741	2742	2743	2744	2745	2746	2747	2748	2749	2750	2751	2752	2753	2754	2755	2756	2757	2758	2759	2760	2761	2762	2763	2764	2765	2766	2767	2768	2769	2770	2771	2772	2773	2774	2775	2776	2777	2778	2779	2780	2781	2782	2783	2784	2785	2786	2787	2788	2789	2790	2791	2792	2793	2794	2795	2796	2797	2798	2799	2800	2801	2802	2803	2804	2805	2806	2807	2808	2809	2810	2811	2812	2813	2814	2815	2816	2817	2818	2819	2820	2821	2822	2823	2824	2825	2826	2827	2828	2829	2830	2831	2832	2833	2834	2835	2836	2837	2838	2839	2840	2841	2842	2843	2844	2845	2846	2847	2848	2849	2850	2851	2852	2853	2854	2855	2856	2857	2858	2859	2860	2861	2862	2863	2864	2865	2866	2867	2868	2869	2870	2871	2872	2873	2874	2875	2876	2877	2878	2879	2880	2881	2882	2883	2884	2885	2886	2887	2888	2889	2890	2891	2892	2893	2894	2895	2896	2897	2898	28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during this period. Updegraff⁹ proposed in 1922 that State aid be distributed on the basis of relative effort made by communities to support a program of education. He assumed that the primary purpose of State aid was to reward or stimulate local effort. Strayer and Haig,¹⁰ and Mort,¹¹ on the other hand, took the position that the fundamental purpose of State aid was to "equalize educational opportunity" and to secure "equalization of financial support of education." Strayer and Haig¹² pointed out that the use of State funds to reward or stimulate local effort actually results in unequal financial burdens.

It is quite evident that Strayer and Haig and Mort drew heavily upon Cubberly.¹³ In 1905, Cubberly had pointed out vast inequalities in the burdens resting upon school districts to support their education programs. He identified six States that were giving some consideration in the distribution of State aid to the equalization principle. In 1920, at least twenty States recognized

⁹Harlan Updegraff, Financial Support in Rural Survey of New York State (Philadelphia: Wm. F. Fell Co., 1922), pp. 110-118.

¹⁰George D. Strayer and Robert Murray Haig, The Financing of Education in the State of New York, Educational Finance Inquiry (New York: The MacMillan Co., 1923), I, 174.

¹¹Paul R. Mort, The Measurement of Education Needs (New York: Teachers College, Columbia University, 1924), Chapters I and II.

¹²Strayer and Haig, op. cit., p. 175.

¹³E. P. Cubberly, State School Administration (Boston: Houghton Mifflin Co., 1927), Chapter V.

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the principle in one way or another, according to McGuire.¹⁴

The over-all plan proposed by Updegraff in 1922 made some provision to equalize the burden of support among school districts, but it also introduced the inconsistency of attempting to reward effort at the same time. Strayer and Haig¹⁵ attempted to define the issues involved in State aid and laid down certain principles by which equalization could be obtained. The Mort study was undoubtedly the most noteworthy in the field during this period. This study pioneered in identifying standards for measuring the educational needs of communities in terms of "weighted pupil--typical teacher" and in devising a plan of equalizing the burden of support.

New implications of the principle of equalization of educational opportunity were first clearly stated by the Educational Finance Inquiry Commission in 1923.¹⁶ Following the formulation of the equalization principle, a long series of individual studies explored various techniques of setting up finance programs within the State to equalize a minimum educational opportunity for all the children.

The Strayer-Haig New York State Education Finance

¹⁴S. H. McGuire, Trends in Principles and Practices of Equalization Opportunity (Nashville: George Peabody College for Teachers, 1934), p. 31.

¹⁵Strayer and Haig, op. cit., p. 174.

¹⁶Ibid.

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Report in 1923, which first introduced the State foundation program concept in such a way that it became a pattern for other similar studies, and Mort's study in 1924 were to have an almost immediate effect on State programs for financing education. The impact of the State foundation program concept has, of course, by no means diminished over the years and is today an extremely potent force in any serious consideration of State support programs for education in the United States

The Search for Equitable Methods
of Allocating State
Transportation Aid

It became obvious to certain authorities in school finance soon after the Strayer-Haig report and Mort's study that pupil transportation should be one of the elements included in any State foundation program. In general, the State aid allowances for pupil transportation during the early 1920's made excessive local effort almost mandatory. The methods used by most of the States both for determining local need and for arriving at a reasonably equitable method of distributing the available State funds for pupil transportation left much to be desired. Flat grant State aid allocations represented, by and large, the method employed to distribute State transportation aid in the few States which provided such aid in the early 1900's.

In 1906 New Jersey and Wisconsin were allocating State transportation aid through flat grants based on

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prescribed per pupil allowance, while Connecticut as early as 1903 and Vermont in 1906 were distributing State transportation aid in the form of flat grants based on matching or a percentage of the local expenditure not to exceed a prescribed maximum.¹⁷ The allocation of flat grants based on per pupil allowances, matching, or percentage of actual expenditures still represents the basic methods used today in a number of States to distribute State transportation aid.

An increasing number of States began to allocate State aid for pupil transportation during the 1920's, and the methods employed to allocate these funds became somewhat more refined. According to Covert's study¹⁸ the seventeen States which allocated State aid funds for pupil transportation in the late 1920's were allocating State transportation aid on at least four distinct bases (Table 4).

It soon became evident in a number of States that the allocation of State matching funds or State aid allowances distributed on a per capita basis invariably introduced inequalities at the local level and resulted all too often in the promotion and expansion of those

¹⁷Arvid J. Burke, Financing Public Schools in the United States (Rev. ed.; New York: Harper and Brothers, 1956), p. 261.

¹⁸Timon Covert, State Aid for School Consolidation and Pupil Transportation, Office of Education, United States Department of the Interior, Leaflet No. 3 (Washington: Government Printing Office, 1931), pp. 6-7.

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TABLE 4.--T

Percentage
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activities and services such as pupil transportation only in those localities which were financially best able to match State funds. With the spread of transportation aid and the equalization programs, it was only natural, therefore, that interest would be gradually centered on finding the most equitable and defensible methods of allocating these State aid funds.

TABLE 4.--The various methods employed in allocating State transportation aid, 1928-29

Percentage of cost	Actual cost not to exceed a prescribed maximum	Not specified	Flat grants	Actual extent of program
Connecticut	Delaware	Indiana	Michigan	South Carolina
Kansas	New Hampshire	Minnesota	Wisconsin	
Maine	Vermont			
Massachusetts				
New Jersey				
New York				
Pennsylvania				
Texas				
Wyoming				

The Burns study--1927.¹⁹--Burns' study is generally credited with initiating the search for more refined and equitable methods for measuring local pupil transportation needs. It provided a basis for determining reasonable operating costs for pupil transportation services, which in turn created the foundation for a more realistic approach to the distribution of State aid allocations.

¹⁹R. L. Burns, Measurement of the Need for Transporting Pupils (New York: Columbia University, 1927), pp. 6-7.

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Burns attempted to develop an index for measuring local transportation need, one of the areas that Mort had failed to include in his pioneer study, which would enable a State to apportion school moneys for pupil transportation on a more equitable basis and in a manner consistent with the principle of a greater equalization of educational opportunities. In a real sense, Burns, as a student of Mort's, set about to develop an index which would supplement or complement Mort's study of the measurement of educational need as related to the transportation of school children.²⁰

In Burns' search for a statistical measure of the transportation need in a given locality, he accepted two factors as being important elements in such a measure: (1) the percentage of the average daily attendance transportation, and (2) the density of school population. Burns found that these factors when weighed by such variables as the average distance children were transported and/or number of small schools or the size, geographically, of attendance areas of school units in a given county in New Jersey, had a high degree of validity insofar as ascertaining the local transportation need. Students of school transportation had recognized for some years that sparsely settled rural communities needed to transport a larger per cent of their children than urban districts in order to maintain centralized schools that

²⁰Ibid.

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compared favorably with the urban districts. Following this lead, Burns made a careful study of the association of density of school population with the per cent of the average daily attendance transported in New Jersey counties and found it to be quite high. Believing that sparsely settled communities transported children longer distances on the average than dense communities, and that due to this fact the per pupil cost of transportation was higher in the sparsely settled communities, he sought a measure of the average distance children were transported in each county to introduce in his index as a weight factor associated with cost.

Burns admitted that there were a number of variables involving certain locally directed policies and programs which caused some statistical departure from his aforementioned index. After developing a measurement of transportation need in terms of transportation need units, Burns then attempted to translate these units into dollars and cents by calculating the cost of the minimum program of transportation to be equalized by the State. Burns' approach to this aspect of the problem was the same approach as had previously been used by Mort, which put simply was: "Inasmuch as the central tendency of expenditures in the State as a whole may be expected to approximate the expenditures in communities of average wealth,

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such measures can be reasonably accepted as unit costs."²¹

According to Burns, the central cost tendency for pupil transportation in New Jersey could be used in determining the unit cost of the minimum transportation program.

Burns, on this basis, determined that \$20 represented the cost of supporting one unit of the minimum transportation program and thus the cost of the minimum transportation program in any given county in New Jersey could be computed simply by multiplying the unit needs of a particular county by 20. Burns recommended that it appeared quite justifiable to place transportation wholly on a county basis, to equalize the burden among the counties by use of his index, to place the burden of supplementing the State's contribution on the whole county, and finally to lodge complete supervision of transportation and apportioning of State and county funds received for this purpose in the office of the county superintendent. He finally suggested that his index for measuring transportation need could be incorporated into a minimum foundation program through use of the weighted pupil principle in a manner similar to that which had been previously advocated by Mort.

The Johns study--1928.²²--The earlier study by

²¹Paul R. Mort, State Support for Public Schools (New York: Columbia University, 1928), p. 20.

²²Roe Lyell Johns, State and Local Administration of School Transportation, Contributions to Education, No. 330 (New York: Bureau of Publications, Teachers College, Columbia University, 1928).

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Burns was to serve as a point of departure for Johns, another student of Mort's, who was to contribute to a further refinement of techniques for determining transportation need during the late 1920's. Johns, in 1928, proposed both a measure of transportation need and a more defensible method of allocating State aid funds which he hoped would remedy certain deficiencies and limitations in the plan proposed by Burns, namely, (1) the limitations relative to the relationship between cost variations and the attendance area per school building used as a weighing factor in measuring transportation need, which, according to Johns, was out of proportion to actual cost variations independent of the controls of the community, and (2) Burns' failure under his plan to provide the State with adequate administrative controls over moneys distributed as transportation aid. Johns felt that Burns' plan did not furnish the State with adequate administrative controls for the distribution of State aid for transportation but rather only a minimum transportation program in terms of hypothetical need units representing dollars of State aid. It was quite possible under Burns' proposal, Johns concluded, to actually subsidize a type of transportation program that should not be included in the State minimum program or be otherwise eligible for State support. Johns pointed out, for instance, that two counties in New Jersey, each with similar factors affecting cost, might be spending widely different amounts in effecting the same

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transportation due to variations in efficiency of local management. Obviously, the State should not encourage inefficiency in its State aid program. Johns' study represented a further attempt to find the relationship that exists between the per cent of the average daily attendance transported and the density of school population (Johns accepted density as the major controlling factor in determining transportation need and as the single most important independent variable for predicting transportation cost) and to set forth State standards for control of the quality of the local program. The standards for quality control enumerated by Johns were as follows:

(1) The State should recognize the transportation being carried on in the average community in a group of communities whose needs for transportation were similar due to the equal effects of factors beyond the control of these communities, as the basis of the minimum program it will recognize in terms of number of students transported.

(2) The State should recognize as the per pupil cost of its minimum program the price paid by the average community in a group of communities whose costs for transportation are affected similarly by factors beyond its control.

(3) The State should recognize in its program of support the transportation done with the minimum determined on the basis of (1) and at a cost within the legitimate minimum determined by (2).

(4) State aid for transportation should not be computed independent of the rest of the State's program of support, but should be combined with it and distributed on the basis of the community's ability to support education.

(5) The State in administering its program of support should not by its administration of those funds encourage local inefficiency or extravagance or render the community inflexible to educational change or reorganization as the science of education progresses.

(6) If it is shown in the administering of the plan that communities by reason of factors beyond

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their control have a transportation need at variance with that predicted by the selected independent variable, or variables, that variation should be included in the minimum program.²³

There is nothing startlingly new or unusual in these so-called standards of Johns'. In reading Mort's²⁴ State Support for Public Schools, one notes the similarity of some so-called principles advanced in that work and Johns' standards.

Johns also recommended that the minimum program of transportation should be determined in a given locality in terms of the per cent of the average daily attendance transported as related to the average daily attendance per square mile. He further recommended that the calculated cost of the program be determined by computing the per pupil cost of transportation in a number of communities due to factors beyond their control through the use of correlations and regressions and by multiplying by the number of students eligible for transportation aid. The allowable State aid in Johns' proposal was to be equal to the actual cost if such cost did not exceed the calculated cost. In computing the transportation expenditures to be allowed each local district within a county to be counted in its total minimum or foundation program, Johns recommended the following procedure:

²³Ibid., pp. 14-15.

²⁴Mort, op. cit.

If a county is transporting equal to or less than its minimum, allow each district all its expenditures for transportation. If it is transporting more than its minimum, divide the minimum program for the county among the several districts on the pro rata basis according to the amount each is spending. State aid for transportation is to be distributed in combination with the other elements of educational need on the basis of the community's taxpaying ability.²⁵

This is done by dividing the State aid allowed by the cost per weighted pupil as determined by Mort's technique and adding together various elements of educational need [into one State aid allocation].

The Evans study--1930.²⁶--Two years after Johns' study, Evans published a study which was to make an important contribution to the fund of information available relative to the problems associated with accurately measuring local transportation need and responsible operating costs and thus to the improvement of State aid plans for financing pupil transportation. Evans in his study proposed, among other things, to find a satisfactory basis for comparing pupil transportation costs and a means of standardizing the cost of pupil transportation on the basis of cost norms in California.

The study indicated that the probable causes for cost variations in pupil transportation included such factors as: (1) length of routes and distances children

²⁵Ibid., p. 131.

²⁶Frank O. Evans, Factors Affecting the Cost of School Transportation in California, Office of Education, United States Department of the Interior (Washington: Government Printing Office, 1930).

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are transported; (2) number of children for whom transportation is furnished; (3) type of equipment used; (4) ownership of equipment or letting contracts for transporting children; (5) age of children--elementary versus high school; (6) density of school population; (7) size of the school district; (8) topography of the country and type of roads in use; (9) type of persons used as drivers, and wages paid; (10) methods used in providing for service; (11) system of accounting in use; and (12) policy used in determining those entitled to transportation. These factors, Evans pointed out, were not all equally adopted to objective measurement, and he also indicated that the interaction between these factors made it extremely difficult to separate and weigh the effects of any one factor independently. Evans' study, therefore, represented an attempt to select those factors which appeared to be essential and pertinent and to measure their effect on the cost of pupil transportation. It is interesting to note that Evans was unable because of a lack of adequate data to evaluate the effect or influence of density on school transportation cost (need) according to the methods previously proposed by Burns or Johns. Evans made an analysis of those elements which contribute to the over-all cost of service, such as depreciation, interest, insurance, fuel, lubricants, tires, repairs and upkeep, and wages. He found certain limitations inherent in this type of approach to the study cost variations

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Evans found that mileage did not influence the cost of certain fixed charges such as depreciation, interest, and insurance; thus any attempt to standardize these items on this basis could be misleading. The cost of fuel, lubricants, tires, and upkeep, on the other hand, were directly dependent on mileage and therefore could be readily standardized on this basis, while the wages of drivers did not belong in either of these two groups and should be considered independently of the other cost factors.

Evans, in this study of transportation in California, found that: (1) 33 per cent of the expenditure for transportation was chargeable to depreciation; (2) 12 per cent to other fixed charges such as interest, storage, and insurance; and (3) 25 per cent to the cost of operation and upkeep.

Evans concluded that norms based upon the total cost per day for routes of given lengths and conveyances of given size were much more practical and reliable as predictors of cost than norms based on the cost per mile or on various units derived from the cost per mile. This was due to the fact, Evans felt, that much of the expense involved is not dependent upon mileage. Evans also discovered in his study that:

1. There was a great lack of proper accounting in California at the time of his study with regard to

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the expenditures for transportation. Attempts to promote better accounting had been hindered, in Evans' opinion, by the introduction of forms requiring too much detail and the use of derived units which frequently make the better management appear the worst. A good accounting system for school transportation, Evans pointed out, must be simple, must present the facts about each project separately, and must show the total cost and exact service rendered;

2. Pupil transportation costs increase approximately at the same rate as the square root of the pupil miles. Evans felt that this was an argument not only against the small project but against small administrative units and the separation of elementary schools and high schools;
3. The variability in wage payments and in the amounts invested in equipment showed that these items should be standardized. Excessive costs, Evans concluded, due to business management were most frequently explainable in terms of unnecessarily high wages paid to drivers or an investment in equipment more expensive than the situation demanded;
4. The case for school ownership rather than the contract plan seemed to be clear. When length of routes and average load were taken into consideration, buses owned by high schools showed costs ranging from 8 to 10 per cent lower than similar projects carried out

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under contract with private parties. This difference, Evans found, was further emphasized by a lower average cost per mile and per pupil when equipment is owned by the school;

5. Only in extreme cases, Evans found, did the size of the district appear to add materially to the cost of transportation. There was no consistent relation between the cost per pupil and the size of the district except in districts with an area of more than 625 square miles; and
6. Mountainous and unimproved roads added to the expense of providing transportation in approximately one-third of the high school districts in California, Evans determined, and the average difference in cost due to this factor ranged from 10 to 15 per cent.

The Lambert study--1935.²⁷--Lambert in 1935

seriously challenged the widely accepted reliance on the findings and work of Mort, Burns, Johns, and others concerning the effect of density or sparsity of population in predicting local pupil transportation need and/or costs. Lambert questioned the validity of Burns' and Johns' findings on the basis, at least in part, of certain statistical liberties he felt had been taken, and on the

²⁷A. C. Lambert, "A Study of Some Factors that Effect the Need for the Transportation of Pupils to and from School at Public Expense with Special Reference to Certain Alleged Affects of the Density of Population upon this Need" (unpublished doctoral dissertation, Stanford University Press, Stanford, California, 1938).

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general contention that density per se did not have as close or reliable a relationship to the necessary quantities or expenses of pupil transportation as certain previous research had indicated.

Lambert²⁸ contended that there were a number of factors which determine the transportation needs of a given locality, such as: (1) the school-organization factor; (2) the limits fixed for a reasonable maximum walking distance for pupils of various ages and grades; (3) the number of pupils in the several cities, towns, villages, and open country who live beyond the accepted maximum walking distances; (4) the time factor as it operates with respect to the actual number of minutes expended in travel and the earliest hour in the morning at which pupils who are picked up for the first delivery can be expected to leave their dwellings; (5) amounts, quality, and configuration of the roads and highways in the region considered; (6) the various capacities of the vehicles that can be used; (7) the mean running speed of the vehicles; (8) the patterns in which dwellings are scattered over the land surface; and (9) natural barriers and civil boundaries that are often changed independently of educational considerations. He also felt that at least the more important factors included in the above list influence the need for pupil transportation

²⁸Asael C. Lambert, School Transportation (Stanford, California: Stanford University Press, 1938).

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independently of the density of population factor.

The major contribution of Lambert was the development of techniques in effectively mapping and determining transportation routes, in which walking distance policies were considered along with a number of other items important in the establishment of pupil transportation services.

Morphet,²⁹ evaluating Lambert's attack on the use of density of population as a factor in measuring pupil transportation need, contended that if proper consideration is given to uninhabited areas and to areas in which pupils walk to school, Lambert's objections to the limitation inherent in this factor for determining need can be met. He pointed to the plans in operation in Alabama, Florida, Ohio, and Oklahoma as evidence that the objection was being met successfully. Morphet further stated:

The most important single factor in a plan for apportioning State funds for transportation is the density of transported population. In fact, practically all other factors are directly related to and involved in this one factor.³⁰

Probably one of the most progressive plans³¹ for

²⁹Edgar L. Morphet, "Problems Invalued in Providing Efficient School Transportation Service," American School and University (Eleventh Annual Edition; New York: American School Publishing Corp., 1939), pp. 539-550.

³⁰Edgar L. Morphet, "Basic Considerations in the Apportionment of State Funds for Pupil Transportation," Addresses and Proceedings, LXXIX (1941), 554.

³¹M. C. S. Noble, Pupil Transportation in the United States (Scranton: International Textbook Company, 1940), p. 175.

allocating State aid for pupil transportation that had been proposed thus far was developed by Hutchins³² in 1938.

The Hutchins study--1938.--Hutchins' findings were in substantial agreement with the research of Burns, Johns, and others, that density was an important factor in determining the transportation costs of a given locality. Hutchins' study supported the wisdom of Evans' multiple factor approach by concluding that there were a number of other significant factors which of necessity must be taken into consideration along with the density factor if a defensible method was to be developed for the measurement of transportation need and the allocation of State aid funds for pupil transportation.

Hutchins found in reviewing the literature, for example, that approximately 70 factors were credited, by one authority or other, with influencing to some extent the cost of pupil transportation.³³

Through a process of elimination, Hutchins finally reduced his original list of seventy factors to ten factors which he found to be of appreciable significance in affecting the cost of pupil transportation and which could reasonably serve as the elements in a formula for allocating State aid funds for pupil transportation. These

³²Clayton D. Hutchins, "The Distribution of State Funds for Pupil Transportation" (unpublished doctoral dissertation, The Ohio State University, Athens, Ohio, 1938).

³³Ibid., p. 48.

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ten factors, Hutchins found, fell into two major groups, on the basis of whether or not they fell within the control of the local board of education. Group I consisted of three uncontrolled factors: (1) number of pupils transported, (2) density, and (3) condition of roads; Group II consisted of seven controlled or managerial factors: (1) pupils transported per bus, (2) average investment per pupil, (3) number of trips per bus, (4) per cent of capacity used, (5) average number of bids, (6) per cent of buses owned by board, and (7) seating arrangements. Hutchins employed the three uncontrolled factors in a regression equation in order to determine a right or basic cost per pupil per month for a given locality, assuming optimum local management policies conditions.

Hutchins employed the seven controlled factors to calculate further adjustments in the basic cost to alleviate variations due to poor local management and thus to discourage costly and undesirable local practices. An example (Table 5) of a typical calculation under Hutchins' formula for a local school district in Ohio is described in his study as follows:³⁴

³⁴Ibid., p. 102.

TABLE 5.--

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TABLE 5.--Calculation of the recommended cost of pupil transportation

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Factors	Status	Per Pupil Per Month	
Constant	-	\$+5.14	
Number of pupils transported (a)	205	-3.77	
Density (a/j)	3.1	- .04	
Road condition (i)	Knox Co.	+1.46	
Pupils per vehicle (a/b)	41	- .08	
Investment per pupil (c/a)	\$25	- .02	
Trips per vehicle (d/b)	1	+ .06	
Per cent of capacity utilized (a/c)	94%	+ .00	
Per cent of buses owned by board (h/b)	0	+ .15	
Number of bids per route (l/b)	1	- .05	
Per cent of seats facing forward (b/e)	45%	+ .01	
<u>Total amount per pupil per month</u>			\$ 2.86
Number of pupils (a)			<u>205</u>
<u>Amount for one month</u>			\$586.30
Number of months (k)			<u>9</u>
Total amount for one year			\$5,267.70
Actual cost reported for 1937-38			\$5,148.00

¹Factor values and/or adjustments listed by Hutchins in Column 1 have not been included inasmuch as the data is meaningless in the absence of certain statistical tables and indexes developed by Hutchins and included in his study.

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A number of important advantages, Hutchins felt, could be secured through the adoption of his so-called 10-factor plan, such as:

1. The amount determined for the district is accurately fitted to the local program since it recognizes the three most significant uncontrolled factors and makes adjustments for the seven most influential managerial factors.
2. A small amount of data is required from each school district. Only ten items of information need be reported.
3. The plan encourages local responsibility since it produces a total amount for the district for one year and requires the local board to apportion this amount to the individual bus drivers. If more is needed, the additional cost can be supplied from local revenues.
4. It is flexible in that other managerial factors may be added or some may be eliminated by the State department of education at any time without changing the total amount spent for pupil transportation. This enables the department to constantly reappraise the transportation program and make changes which will obtain safe, comfortable, efficient, and economical transportation.

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Financial Support Programs for Pupil
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Lambert³⁵ in 1938 pointed out the fact that largely as a result of the influence of Mort and the work of Burns and Johns concerning the association between density or population and necessity for school transportation, a number of State aid plans and formulas for financing pupil transportation had incorporated at least to some degree this concept. To illustrate the influence of this concept, a number of studies have been cited, for example, the State aid studies conducted in Pennsylvania in 1927,³⁶ in Nebraska³⁷ and Kansas in 1928,³⁸ in Colorado³⁹ and

³⁵Lambert, School Transportation, op. cit., pp. 64-65.

³⁶Paul R. Mort, Increased State Aid for Public Schools, Report of the Governor's Commission to Study the Distribution of State Subsidies to School Districts (Harrisburg, Pennsylvania, 1927).

³⁷Idem, A Plan for Providing Equality of Educational Opportunity in Nebraska, Research Bulletin No. 3 (Omaha, Nebraska: State Teachers Association, 1928), pp. 16, 31, 43.

³⁸Idem, A Plan for Providing Equality of Educational Opportunity in Kansas, Report of the State School Case Commission of Kansas, Supplement to Volume II, 1928; also in Complete Report, 1929.

³⁹Idem, A Preliminary Report on the Reconstruction of the System of Financing Public Schools in the State of Colorado, Educational Finance Committee (Colorado: Education Association, 1929), pp. 5, 14, 15.

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and Florida in 1929,⁴⁰ and in Ohio in 1935,⁴¹ as well as a number of studies completed in the early 1930's, such as Jones and Holmstedt's Indiana study,⁴² Gordon's Colorado study,⁴³ and Tonkinson's work in Oklahoma.⁴⁴

The various State aid plans for financing pupil transportation could be classified by 1938 into six distinct groupings (Table 6):⁴⁵

⁴⁰Educational Survey Commission and Survey Staff Report to the Legislature (Florida, 1929), pp. 162-163.

⁴¹C. D. Hutchins, Administration of Pupil Transportation, Bulletin No. 2 (Columbus, Ohio: Department of Education, 1935), p. 7; and Ohio G. C. 7595-1c, Subsection d.

⁴²J. W. Jones and R. W. Holmstedt, "The Distribution of State Funds for the Purpose of Equalizing Educational Opportunity in Indiana," A Report of the Commission on State Aid for Public Schools in Indiana, 1930, p. 18.

⁴³Gary Gordon, "A Technique for Determining the Need for School Transportation in Colorado and A Suggested Procedure for Administering State Aid for This Need" (unpublished master's thesis, University of Denver, Denver, Colorado, 1930).

⁴⁴Glen E. Tonkinson, "A Measure of Transportation Costs in Consolidated Schools" (unpublished master's thesis, University of Oklahoma, Norman, Oklahoma, 1930), pp. 9, 12, 18.

⁴⁵Hutchins, "The Distribution of State Funds for Pupil Transportation," op. cit., p. 26.

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TABLE 6.--Summary of the methods used for distributing
State funds for pupil transportation in 1938¹

(1) State funds only to poor districts	(2) Flat rate per pupil paid by State	(3) Per cent of cost paid by State
Indiana Maryland New Hampshire Utah	Arkansas Tennessee Texas Wisconsin	Mississippi Montana New Jersey New York Pennsylvania
(4) Cost, but not exceeding a maximum paid by State	(5) Factors related to the cost recognized	(6) Entire cost financed by State
Massachusetts Michigan Missouri Ohio Oklahoma	Alabama Minnesota South Carolina Washington	Delaware North Carolina

¹Hutchins, "The Distribution of State Funds for
Pupil Transportation," op. cit., p. 26.

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For illustrative purposes the following six summarizations may be typical examples of State provisions under the aforementioned six categories:

Indiana

State funds for pupil transportation are allowed only to the State School Relief Districts. Such districts are required by law to advertise for bids. Reimbursement for transportation expense, not exceeding schedules approved by the State Department of Education, are made from State aid funds.

Arkansas

In distributing the Equalizing Fund the State recognizes ". . . \$12 per pupil per year for the average number of pupils transported for the first seven months. Children who live within two miles of the school which they attend must not be counted in determining the average number transported."

Mississippi

The State recognizes the cost of transportation along with other items of current operating expense in distributing State money to the counties for school purposes. Bids are required prior to the signing of transportation contracts.

Massachusetts

The Commonwealth reimburses local districts for the expense of transporting high school students to the extent stated in the following schedule:

<u>Expenditure per pupil for each \$1000 of taxable valuation</u>	<u>Reimbursement</u>
\$4.00 to \$4.99	1/2 cost of transportation
\$5.00 to \$5.99	3/4 cost of transportation

The reimbursement is based upon not more than \$.40 per pupil a day for transportation.

Alabama

On February 8, 1936, the Alabama State Board of Education adopted a new plan of distributing about \$1,500,000 annually for a minimum program of pupil

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transportation. The method recognizes density and number of pupils as the chief factors affecting the cost of transportation. The rate of increase is limited for any district by its proximity to the "Saturation Index."

Delaware

The State Board of Education issues a "transportation permit" to each pupil entitled to transportation. A child holding a permit may ride the school buses, which are routed, operated, and financed by the State Board of Education. In addition to this bus service, the boards receive funds from the State for necessary "private transportation."⁴⁶

At least thirty States were providing State aid for pupil transportation in the 1930's. Approximately one-half of these States included State aid for pupil transportation in their State foundation programs.⁴⁷ One-third of the States during this period provided State aid allowances for pupil transportation in the form of special-purpose matching grants, while the remaining States allocated State aid funds for pupil transportation in the form of special-purpose flat grants.

The Council of State Governments⁴⁸ in 1949 revealed that,

State aid for transportation is now well established in all but eight States . . . Eighteen States provide aid through special-purpose flat grants, sixteen as part of their foundation program, two through special-purpose equalization funds, and four through some combination of the above.⁴⁹

⁴⁶Ibid., pp. 14-19.

⁴⁷Burke, op. cit., p. 621.

⁴⁸Francis S. Chase, The Forty-Eight State School Systems (Chicago: Council of State Governments, 1949), p. 245.

⁴⁹Ibid., p. 103.

The Cox study--1951.⁵⁰--In an analysis of the State aid formulas in 1951, Cox found that the basis for allocating State transportation aid could be generally classified into one of five ways:

1. Counting of one or more factors in the transportation program such as number of pupils transported, number of miles pupils were transported, etc., and allowing a certain amount for each unit thus counted.
2. Measuring the need for transportation by formula, using objective factors that are present in all districts.
3. Analyzing costs by applying standards to all costs or certain selected costs.
4. Approval of costs and allowances of all or a certain prescribed percent of costs as reimbursement.
5. Allowances on a flat amount per pupil in average daily attendance or number of teachers, factors that have little if any relationship to transportation need.⁵¹

Cox summarized (Table 7) the basis used in the various States for computing aid for pupil transportation in 1948-49.⁵²

In analyzing his findings as to the basis for allocating State transportation aid, Cox concluded that, from the standpoint of providing State aid on a sound objective basis in terms of need with equality among districts, the methods employed by the various States at that time, 1948-49, could be rated in accordance with the

⁵⁰Ronald W. Cox, "The Determination of State Reimbursable Costs of Pupil Transportation (unpublished doctoral dissertation, University of California, Berkeley, California, 1951).

⁵¹Ibid., p. 108.

⁵²Ibid., p. 107.

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TABLE 7.--Basis for computing aid for pupil transportation,
1948-49

Basis used	Number of States using basis
Number of pupils transported	28
Number of miles traveled	11
Density of pupils transported	8
Per cent of cost	8
Cost of previous year	9
Items of cost	2
Depreciation	6
Number of buses	3
Condition of roads	4
Budget approval	2
Distance from school	20
State average cost	1

following descriptive rating scale. A State aid formula represented, in Cox's view, the most objective method that a State could employ, while flat grants based on ADA or some such factor or factors was the least desirable method States could employ as a basis for allocating State aid funds for transportation.

1. Measuring the need for transportation by formula.
2. Counting one or more factors in the transportation program.
3. Analyzing costs by the application of standards.

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4. Approval of actual, or a per cent of, cost.
5. Flat grants awarded in lieu of transportation based on average daily attendance or number of teachers, etc.

Cox pointed out that Mort, Noble, Morphet, Johns, Burns, and others agreed that measuring the need for transportation by formula most nearly reached complete equity.⁵³

Cox further concluded that:

1. Counting one or more factors has the advantage of dealing with districts without apparent discrimination but disregards the important factors that should be used to measure need.
2. Analyzing costs by the application of standards, in addition to being a long tedious task, tends to level down the quality of transportation service as standards are generally set in terms of norms. However, when standards are on careful cost analysis of efficient and adequate systems, they are likely to be reasonably sound and certainly an improvement over any subjective plan of providing State aid.
3. Grants based on approved costs or a per cent of approved costs have a limited advantage of providing a means for the State to share in transportation costs. They do not promote efficiency. They reward extravagance and inefficiency and provide that the wealthy school district will receive more than others.

⁵³Ibid., p. 110.

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These facts are increasingly true when reimbursement by the State becomes an increasingly larger per cent of cost.

4. Flat grants based on factors unrelated to transportation needs are low in equity for they do not take into consideration the actual need of the district for transportation services, a need that varies greatly among districts.

Cox provides us, in his study, with an excellent summary of the status of school transportation State aid formulas in 1949-50 (Table 8).⁵⁴

⁵⁴Ibid., p. 80.

TABLE 8.--State aid for pupil transportation, 1949-50

States	Type of State aid			Major basis for computing aid											
	Part of foundation program	Special purpose equalizing	Special purpose flat grant	No. of pupils	No. of miles	Dens. trans. pupils	Per cent. cost	Cost prev. year	Item of cost	Depreciation	No. of buses	Cond. of roads	Budget approval	Dist. from school	State aver. cost
(1)	(2)	(3)	(4)	(5)	(6)	(7)	(8)	(9)	(10)	(11)	(12)	(13)	(14)	(15)	(16)
Alabama	x	-	-	x	-	x	-	x	-	-	-	-	-	x	-
Arizona	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-
Arkansas	-	-	x	$\frac{1}{x}$	-	-	-	-	-	-	x	-	-	x	-
California	-	x	-	$\frac{1}{x}$	-	-	-	x	-	$\frac{2}{x}$	-	-	-	-	-
Colorado	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-
Connecticut	-	-	-	$\frac{1}{x}$	-	-	x	-	-	-	-	-	-	-	-
Delaware	$\frac{3}{x}$	-	$\frac{1}{x}$	-	-	-	-	x	-	-	-	-	-	-	-
Florida	x	-	-	x	-	x	-	-	-	-	-	-	-	x	-
Georgia	x	-	-	x	x	-	-	-	-	x	-	x	-	-	-
Idaho	x	-	-	x	-	-	-	-	-	-	-	-	-	-	x
Illinois	-	-	x	x	-	-	x	-	-	-	-	-	-	x	-
Indiana	-	x	-	x	-	-	-	-	-	-	-	-	-	x	-
Iowa	-	-	x	x	x	-	x	-	-	-	-	x	-	-	-
Kansas	x	-	-	x	-	-	-	-	-	-	-	-	-	x	-
Kentucky	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-
Louisiana	x	-	-	x	x	-	-	-	-	-	-	x	-	-	-
Maine	x	-	x	-	-	-	x	$\frac{5}{x}$	$\frac{6}{x}$	$\frac{6}{x}$	-	-	-	-	-
Maryland	x	-	-	-	-	-	-	$\frac{5}{x}$	$\frac{6}{x}$	$\frac{6}{x}$	-	-	-	x	-
Massachusetts	-	-	x	x	-	-	-	-	-	-	-	-	-	x	-
Michigan	x	-	-	x	x	-	-	-	-	-	-	-	-	x	-
Minnesota	-	-	x	x	-	-	-	-	-	-	-	-	-	x	-
Mississippi	$\frac{7}{x}$	-	$\frac{8}{x}$	x	-	-	-	-	-	-	-	-	-	-	-
Missouri	-	-	x	x	-	-	-	x	-	-	-	-	-	x	-
Montana	-	-	x	x	-	-	-	-	-	-	-	-	x	x	-
Nebraska	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-
Nevada	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-
New Hampshire	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-
New Jersey	-	-	x	-	-	-	x	-	-	-	-	-	-	x	-
New Mexico	-	-	x	x	x	-	-	-	-	-	x	-	-	x	-
New York	-	x	-	-	-	-	-	-	x	x	-	-	-	-	-
North Carolina	-	-	x	-	-	-	-	-	-	-	-	-	x	-	-
North Dakota	$\frac{2}{x}$	$\frac{10}{x}$	-	-	-	-	-	-	-	-	-	-	-	-	-
Ohio	-	-	-	x	x	x	-	-	-	-	-	x	-	x	-
Oklahoma	x	-	x	x	-	x	-	-	-	-	-	-	-	-	-
Oregon	-	-	x	x	x	x	-	-	-	-	-	-	-	x	-
Pennsylvania	-	x	$\frac{12}{x}$	-	-	-	$\frac{11}{12}$	$\frac{x}{x}$	-	-	-	-	-	-	-
Rhode Island	-	-	-	-	-	-	-	$\frac{13}{x}$	-	-	-	-	-	-	-
South Carolina	-	-	x	-	-	-	-	-	x	-	-	-	-	-	-
South Dakota	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-
Tennessee	x	-	-	x	-	x	-	-	-	-	-	-	-	x	-
Texas	x	-	-	x	-	x	-	x	-	-	-	-	-	-	-
Utah	x	-	-	x	x	-	-	-	-	-	-	-	-	x	-
Vermont	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-
Virginia	-	-	x	x	x	-	-	x	-	-	x	-	-	-	-
Washington	x	-	-	-	-	-	x	-	-	-	-	-	-	-	-
West Virginia	x	-	-	-	-	x	-	-	-	-	-	-	-	-	-
Wisconsin	-	x	-	x	x	-	-	-	-	-	-	-	-	x	-
Wyoming	-	-	x	x	x	-	-	-	-	x	-	-	-	x	-

1/Number of pupils (average daily attendance) used to determine amount of fund.

2/Actual replacement allowance granted when bus is replaced by a new bus.

3/For district owned transportation.

4/For contract transportation. State pays contractor direct.

5/Maximum set by State Department of Education.

6/Applies only to contracted transportation.

7/For resident pupils.

8/For non-resident pupils.

9/For current expenses only.

10/For bus purchase only.

11/Allowances to districts for contracted transportation limited to costs in districts owning and operating their own transportation systems.

12/For non-resident high school pupils only.

13/Costs of a designated prior year changed periodically are used. The year 1945-46 was used as basis for allowances in 1949-50.

Source: Ronald W. Cox, "The Determination of State Reimbursable Costs of Pupil Transportation," doctoral dissertation (California: 1951), pp. 252-55. A composite of two tables appearing in Cox's study.

State	Population, 1940-45									
	(1)	(2)	(3)	(4)	(5)	(6)	(7)	(8)	(9)	(10)
Alabama	1,500,000	1,500,000	1,500,000	1,500,000	1,500,000	1,500,000	1,500,000	1,500,000	1,500,000	1,500,000
Alaska	1,500,000	1,500,000	1,500,000	1,500,000	1,500,000	1,500,000	1,500,000	1,500,000	1,500,000	1,500,000
Arizona	1,500,000	1,500,000	1,500,000	1,500,000	1,500,000	1,500,000	1,500,000	1,500,000	1,500,000	1,500,000
Arkansas	1,500,000	1,500,000	1,500,000	1,500,000	1,500,000	1,500,000	1,500,000	1,500,000	1,500,000	1,500,000
California	1,500,000	1,500,000	1,500,000	1,500,000	1,500,000	1,500,000	1,500,000	1,500,000	1,500,000	1,500,000
Colorado	1,500,000	1,500,000	1,500,000	1,500,000	1,500,000	1,500,000	1,500,000	1,500,000	1,500,000	1,500,000
Connecticut	1,500,000	1,500,000	1,500,000	1,500,000	1,500,000	1,500,000	1,500,000	1,500,000	1,500,000	1,500,000
Delaware	1,500,000	1,500,000	1,500,000	1,500,000	1,500,000	1,500,000	1,500,000	1,500,000	1,500,000	1,500,000
District of Columbia	1,500,000	1,500,000	1,500,000	1,500,000	1,500,000	1,500,000	1,500,000	1,500,000	1,500,000	1,500,000
Florida	1,500,000	1,500,000	1,500,000	1,500,000	1,500,000	1,500,000	1,500,000	1,500,000	1,500,000	1,500,000
Georgia	1,500,000	1,500,000	1,500,000	1,500,000	1,500,000	1,500,000	1,500,000	1,500,000	1,500,000	1,500,000
Hawaii	1,500,000	1,500,000	1,500,000	1,500,000	1,500,000	1,500,000	1,500,000	1,500,000	1,500,000	1,500,000
Idaho	1,500,000	1,500,000	1,500,000	1,500,000	1,500,000	1,500,000	1,500,000	1,500,000	1,500,000	1,500,000
Illinois	1,500,000	1,500,000	1,500,000	1,500,000	1,500,000	1,500,000	1,500,000	1,500,000	1,500,000	1,500,000
Indiana	1,500,000	1,500,000	1,500,000	1,500,000	1,500,000	1,500,000	1,500,000	1,500,000	1,500,000	1,500,000
Iowa	1,500,000	1,500,000	1,500,000	1,500,000	1,500,000	1,500,000	1,500,000	1,500,000	1,500,000	1,500,000
Kansas	1,500,000	1,500,000	1,500,000	1,500,000	1,500,000	1,500,000	1,500,000	1,500,000	1,500,000	1,500,000
Kentucky	1,500,000	1,500,000	1,500,000	1,500,000	1,500,000	1,500,000	1,500,000	1,500,000	1,500,000	1,500,000
Louisiana	1,500,000	1,500,000	1,500,000	1,500,000	1,500,000	1,500,000	1,500,000	1,500,000	1,500,000	1,500,000
Maine	1,500,000	1,500,000	1,500,000	1,500,000	1,500,000	1,500,000	1,500,000	1,500,000	1,500,000	1,500,000
Maryland	1,500,000	1,500,000	1,500,000	1,500,000	1,500,000	1,500,000	1,500,000	1,500,000	1,500,000	1,500,000
Massachusetts	1,500,000	1,500,000	1,500,000	1,500,000	1,500,000	1,500,000	1,500,000	1,500,000	1,500,000	1,500,000
Michigan	1,500,000	1,500,000	1,500,000	1,500,000	1,500,000	1,500,000	1,500,000	1,500,000	1,500,000	1,500,000
Minnesota	1,500,000	1,500,000	1,500,000	1,500,000	1,500,000	1,500,000	1,500,000	1,500,000	1,500,000	1,500,000
Mississippi	1,500,000	1,500,000	1,500,000	1,500,000	1,500,000	1,500,000	1,500,000	1,500,000	1,500,000	1,500,000
Missouri	1,500,000	1,500,000	1,500,000	1,500,000	1,500,000	1,500,000	1,500,000	1,500,000	1,500,000	1,500,000
Montana	1,500,000	1,500,000	1,500,000	1,500,000	1,500,000	1,500,000	1,500,000	1,500,000	1,500,000	1,500,000
Nebraska	1,500,000	1,500,000	1,500,000	1,500,000	1,500,000	1,500,000	1,500,000	1,500,000	1,500,000	1,500,000
Nevada	1,500,000	1,500,000	1,500,000	1,500,000	1,500,000	1,500,000	1,500,000	1,500,000	1,500,000	1,500,000
New Hampshire	1,500,000	1,500,000	1,500,000	1,500,000	1,500,000	1,500,000	1,500,000	1,500,000	1,500,000	1,500,000
New Jersey	1,500,000	1,500,000	1,500,000	1,500,000	1,500,000	1,500,000	1,500,000	1,500,000	1,500,000	1,500,000
New Mexico	1,500,000	1,500,000	1,500,000	1,500,000	1,500,000	1,500,000	1,500,000	1,500,000	1,500,000	1,500,000
New York	1,500,000	1,500,000	1,500,000	1,500,000	1,500,000	1,500,000	1,500,000	1,500,000	1,500,000	1,500,000
North Carolina	1,500,000	1,500,000	1,500,000	1,500,000	1,500,000	1,500,000	1,500,000	1,500,000	1,500,000	1,500,000
North Dakota	1,500,000	1,500,000	1,500,000	1,500,000	1,500,000	1,500,000	1,500,000	1,500,000	1,500,000	1,500,000
Ohio	1,500,000	1,500,000	1,500,000	1,500,000	1,500,000	1,500,000	1,500,000	1,500,000	1,500,000	1,500,000
Oklahoma	1,500,000	1,500,000	1,500,000	1,500,000	1,500,000	1,500,000	1,500,000	1,500,000	1,500,000	1,500,000
Oregon	1,500,000	1,500,000	1,500,000	1,500,000	1,500,000	1,500,000	1,500,000	1,500,000	1,500,000	1,500,000
Pennsylvania	1,500,000	1,500,000	1,500,000	1,500,000	1,500,000	1,500,000	1,500,000	1,500,000	1,500,000	1,500,000
Rhode Island	1,500,000	1,500,000	1,500,000	1,500,000	1,500,000	1,500,000	1,500,000	1,500,000	1,500,000	1,500,000
South Carolina	1,500,000	1,500,000	1,500,000	1,500,000	1,500,000	1,500,000	1,500,000	1,500,000	1,500,000	1,500,000
South Dakota	1,500,000	1,500,000	1,500,000	1,500,000	1,500,000	1,500,000	1,500,000	1,500,000	1,500,000	1,500,000
Tennessee	1,500,000	1,500,000	1,500,000	1,500,000	1,500,000	1,500,000	1,500,000	1,500,000	1,500,000	1,500,000
Texas	1,500,000	1,500,000	1,500,000	1,500,000	1,500,000	1,500,000	1,500,000	1,500,000	1,500,000	1,500,000
Vermont	1,500,000	1,500,000	1,500,000	1,500,000	1,500,000	1,500,000	1,500,000	1,500,000	1,500,000	1,500,000
Virginia	1,500,000	1,500,000	1,500,000	1,500,000	1,500,000	1,500,000	1,500,000	1,500,000	1,500,000	1,500,000
Washington	1,500,000	1,500,000	1,500,000	1,500,000	1,500,000	1,500,000	1,500,000	1,500,000	1,500,000	1,500,000
West Virginia	1,500,000	1,500,000	1,500,000	1,500,000	1,500,000	1,500,000	1,500,000	1,500,000	1,500,000	1,500,000
Wisconsin	1,500,000	1,500,000	1,500,000	1,500,000	1,500,000	1,500,000	1,500,000	1,500,000	1,500,000	1,500,000
Wyoming	1,500,000	1,500,000	1,500,000	1,500,000	1,500,000	1,500,000	1,500,000	1,500,000	1,500,000	1,500,000

1. Number of people (white and black) living in the United States in 1940.

2. Total population of the United States in 1940.

3. Total population of the United States in 1945.

4. Total population of the United States in 1950.

5. Total population of the United States in 1955.

6. Total population of the United States in 1960.

7. Total population of the United States in 1965.

8. Total population of the United States in 1970.

9. Total population of the United States in 1975.

10. Total population of the United States in 1980.

CHAPTER III

CHARACTERISTICS OF STATE PLANS FOR FINANCING PUPIL TRANSPORTATION

The important characteristics or elements of State plans for financing pupil transportation which will be discussed in this chapter represent basically those considerations contained in a survey of the current characteristics of the fifty State plans for financing pupil transportation which was conducted in connection with this study.¹ Such basic considerations will be considered as: (1) the relationship of transportation aid to the State foundation program, (2) the various methods used to distribute State aid allocations for pupil transportation, (3) school transportation State aid formulas and the factors affecting the cost of the service incorporated into these formulas, and (4) the various eligibility requirements for receiving State transportation aid.

In this chapter we propose to do three things:

1. To set forth those common elements or characteristics which according to a number of authorities are the important considerations in any State plan for financing pupil transportation.

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2. To present the current status of the fifty State plans for financing pupil transportation in terms of these elements or characteristics.
3. To provide a cursory analysis of some of the strengthes and/or weaknesses inherent in certain of these characteristics.

State Transportation Aid and
The Foundation Program

Forty-four States now expressly allocate State aid for pupil transportation² and in a number of the remaining States certain State aid funds may be expended for this service even though they may not have been expressly allocated for this purpose.

The States that allocated State transportation aid are almost equally divided as to whether or not this State allowance is allocated separate from or included as a part of the State foundation program.³

A State foundation program for education represents a program of State aid support for public education in terms of a level of financial support for certain basic and special services available to all children of the State, financed through some combination of State and

²Table 10, p. 71.

³Albert R. Munse, and Eugene P. McLoone, Public School Finance Programs of the United States, 1957-58, Office of Education, United States Department of Health, Education, and Welfare, Misc. No. 33 (Washington: Government Printing Office, 1960).

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local equalized effort.⁴ While a foundation or minimum State aid program may represent a single comprehensive State aid program, other types of State aid programs are also quite often viewed as State foundation programs.

For example, while the complete State-supported programs of Delaware and North Carolina may normally be viewed as State foundation programs, the combination of a number of special and general State aid allocations can also be considered, in total, as a foundation program, as is the case at the present time in a number of States.⁵

Although students of school finance have agreed that the transportation needs should be one of the elements included in any State foundation program of education, in actual practice State aid for pupil transportation has evolved in many States without reference to the State foundation program.⁶

In the 1930's, during the depression, when local school districts were finding it difficult to obtain necessary revenue at the local level, State legislatures began to appropriate State funds for the purpose of relieving local tax burdens as well as increasing the level of State aid for education. It soon became evident in a number of States that the special-purpose State aid allocations and the general State aid support programs

⁴Ibid., p. 2.

⁵Ibid., p. 3.

⁶Department of Rural Education, op. cit., p. 2.

for education, which had evolved from the earlier permanent endowment allocations, should be included in one broad single State aid program. These single fund State aid plans or programs became known generally as State minimum or foundation programs.⁷

A State aid allocation for pupil transportation may be distributed in a number of ways. One method employed is to make the State aid payment to the local school district in support of the transportation program without regard for any other State moneys paid to that district. Another method commonly used in a number of States is to include in the State foundation program an amount for transportation as may be determined by some method of measuring the local need and/or cost for this service. At least two approaches are available in this regard, (1) the so-called "lump sum plan,"⁸ whereby the State aid allocation is computed on the basis of an allowance per pupil or classroom unit, or (2) the "item plan,"⁹ in which the State aid allocation is computed for a number of separate and specific budget items with perhaps separate allowances provided for each budget item. When these methods of computing State assistance are used, the State may or may not indicate in the State aid allowance that a certain amount of the State funds allocated was for

⁷Munse and McLoone, op. cit., p. 2.

⁸Ibid., p. 3.

⁹Ibid.

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transportation or for any other specific item in the foundation program.¹⁰ Further, in several States an additional provision is made for State aid equalization whereby a wealthy district may on the basis of the State equalization formula receive less State aid than a poorer district.

A number of States operate under the premise that, inasmuch as the expenses and/or costs of general education constitute a major portion of the school budget and since the need for such special services and programs as pupil transportation may vary considerably between local school districts, there may be considerable merit in providing for a separate computation and/or allocation for a number of special services and programs somewhat apart or separate from the so-called State foundation or minimum program. While it may be generally true that the necessary cost of transportation is obviously influenced by a number of factors not necessarily related to the various measures of educational need which may be incorporated into a general State aid or foundation program, there is the point of view that transportation can be readily included and should be included in a single State aid computation.¹¹

Certain authorities contend, on the other hand, that the complete equalization theory of central finance in a

¹⁰Department of Rural Education, op. cit., p. 22.

¹¹Roe L. Johns and Edgar L. Morphet, Financing the Public Schools (Englewood Cliffs, N. J.: Prentice-Hall, Inc., 1960), p. 350.

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system which provides for locally adopted and administered budgets can be administered with a degree of equality only when applied to certain common recurring annual local operating expenditures. This same approach, however, may be extremely difficult to administer, they point out, when applied to the total over-all school expenditures, including pupil transportation, which may represent a major financial item in certain localities or operating units and not in others.¹²

Although some authorities indicate that the trend has been toward including State transportation aid in the State foundation program,¹³ it is evident that at least in recent years this trend has been somewhat stabilized. Perhaps the reason for the stabilization of this trend has been a greater general acceptance in recent years of the aforementioned theory that the over-all State aid program may be somewhat more easily administered and that the results will normally be the same, regardless of whether or not a State allocates a single or a number of separate State aid allocations, if the sum total of all allocations are combined in the final analysis into a single State aid program, and if the amount of over-all State support remains the same. This may account, in part, for the fact that the State aid allowance for

¹²Arvid J. Burke, Financing Public Schools in the United States (Rev. ed.; New York: Harper and Brothers, 1956), p. 591.

¹³Ibid., p. 620.

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transportation in several States is now equalized independently rather than through a "single fund" or "lump sum" foundation program.

In summary it would appear that, if the amount of State aid allowance for transportation is the same, the over-all effect can be the same regardless of whether or not the State transportation aid is allocated separately or as part of the foundation program as in the "item plan" approach or as a part of the foundation program using the so-called "single fund" or "lump sum plan" approach. The basic formulas for computing the State aid allowance for transportation in the foundation programs, regardless of the approach employed are often based on matching, or on a number of specific measures of need and cost,¹⁴ to somewhat the same degree as computations determined apart from foundation programs.

Although some authorities question the desirability and/or the practicability of including transportation in a foundation program on the basis of classroom units or weighted pupils,¹⁵ a number of studies have indicated the desirability and practicability of this course.¹⁶ The real issue, however, may not be centered around the particular method employed but rather on the question of whether or not any foundation program which excludes

¹⁴Ibid., p. 624.

¹⁵Johns and Morphet, op. cit., p. 176.

¹⁶Ibid.

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essential elements of school costs is an incomplete foundation program inasmuch as the word "foundation" itself implies a comprehensiveness.¹⁷

Regardless of the various methods employed to allocate State aid for pupil transportation, there has been a growing trend toward greater State support for this service.¹⁸

Table 9 illustrates the stabilization of the trend toward including State transportation aid in the State foundation program.

Methods Used for Distributing State Transportation Aid

The basis on which State aid funds for pupil transportation are allocated varies from the flat grant allocations in a few States¹⁹ to State aid allowances allocated on the basis of the actual, approved, or average cost of operating a local program, or some prescribed percentage of the local cost, in a somewhat larger number of States.²⁰ More than half of the States that allocate transportation aid use some type of formula for computing the transportation need of the local administrative units, although in a number of these States the formula is used only to set a ceiling for the cost for which the State will reimburse.

¹⁷Ibid.

¹⁸Department of Rural Education, op. cit.

¹⁹Table 10, p. 71.

²⁰Ibid.

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TABLE 9.--The extent to which State transportation aid has been recognized as an element in State foundation programs since 1932

1932 ^{1/}	1949-50 ^{2/}	1955 ^{3/}	1956 ^{4/}	1962 ^{5/}
(15 States)	(19 States)	(20 States)	(21 States)	(22 States)
Arkansas	Alabama	Alabama	Alabama	Alabama
Delaware	Delaware	Florida	Florida	Florida
Florida	Florida ^{6/}	Georgia	Georgia	Georgia
Indiana	Georgia	Idaho	Idaho	Idaho
Louisiana	Idaho	Kansas	Indiana	Indiana
Maryland	Kansas	Kentucky	Kansas	Kansas
Mississippi	Louisiana	Louisiana	Kentucky	Kentucky
North Carolina	Maine	Maryland	Louisiana	Louisiana
Ohio	Maryland	Michigan	Maryland	Maryland
Oklahoma	Michigan	Mississippi	Michigan	Michigan
Rhode Island	Mississippi	Missouri	Mississippi	Mississippi
South Dakota	Missouri ^{7/}	Ohio	Missouri	*Missouri
Tennessee	Ohio ^{8/}	Oklahoma	Ohio	North Dakota
Utah	Oklahoma	Pennsylvania	Oklahoma	Ohio
West Virginia	Tennessee	Rhode Island	Pennsylvania	Oklahoma
	Texas	Tennessee	Rhode Island	Pennsylvania
	Utah	Texas	Tennessee	*Rhode Island
	Washington	Utah	Texas	Tennessee
	West Virginia	West Virginia	Utah	Texas
		Wyoming	West Virginia	Utah
			Wyoming	West Virginia
				Wyoming

^{1/}Arvid J. Burke, Financing Public Schools in the United States. (New York: Harper & Brothers, 1957), p. 621.

^{2/}Ronald W. Cox, "Determination of State Reimbursable Costs of Pupil Transportation." doctoral dissertation (Berkeley: University of California, 1951), pp. 254-55.

^{3/}E. Glenn Featherston, "Characteristics of State Plans for Financing Pupil Transportation," Office of Education, United States Department of Health, Education, and Welfare, Circular No. 458 (Washington: Office of Education, October 1955).

^{4/}E. Glenn Featherston, "Characteristics of State Plans for Financing Pupil Transportation," Office of Education, United States Department of Health, Education, and Welfare, Circular No. 458 (Rev. ed.; Washington: Office of Education, November 1956).

^{5/}John B. Murray, "Characteristics of State Plans for Financing Pupil Transportation," Office of Education, United States Department of Health, Education, and Welfare, (Washington: Office of Education, 1963).

^{6/}For resident pupils.

^{7/}For non-resident pupils.

^{8/}For current expenses only.

*It is not perfectly clear as to whether or not State transportation aid represents a part of the foundation program in this State.

As pupil transportation services have expanded, it has become apparent in a number of the States allocating State aid for transportation on the basis of matching special-purpose grants that this method introduces many inequalities. The districts most in need of providing the service are often the very districts least able, because of a low tax base, to match the State funds for which they were eligible. At first glance, it would appear that the shortcomings inherent in allocating State aid funds for pupil transportation on the basis of matching special-purpose State aid grants would not be found in those States that allocated State transportation aid on the basis of special purpose per capita flat grants. As a matter of fact, this method actually had a similar effect because all too often State aid allocated on the basis of per capita State aid flat grants tended to be insufficient. In some States the allowance consisted of a percentage of the actual cost and often in no way was the State aid grant proportionate to the actual expense for this service at the local level; thus many inequalities resulted.

The reaction of some authorities in the field to the various methods employed in allocating State school transportation aid can be summarized as follows:

State aid for pupil transportation in the form of flat grants is not equitable because of per pupil cost variations resulting from factors beyond local control such as sparsity.²¹

²¹ Johns and Morphet, op. cit., p. 348.

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State aid reimbursement allocated on the basis of a certain percentage of total cost for this service may reward uneconomical practices.²²

The most serious defect in this method, however, may be in the fact that poorer districts which are able to support the program are treated equally with wealthy districts.²³

There may be a greater tendency to impose undesirable State controls in those States that distribute State transportation funds on the basis of expenditures or a percentage of the expenditures.²⁴

Research concerning various methods for determining the most equitable basis for allocating State aid funds for transportation has been chiefly centered in the last 25 years in developing and refining various indexes of transportation need.²⁵

A number of States allocated State transportation aid on the basis of a percentage of the allowable cost to encourage economy and efficiency. States employing this method may require the maintenance of certain standards.

Although States have employed a variety of methods for allocating State aid funds for pupil transportation during the past 25 years, there does not appear to be any agreement as to which is the best method.²⁶

The status of the various methods currently employed in the fifty States to distribute State transportation aid is indicated in Table 10.

²²Ibid.

²³Ibid.

²⁴Ibid.

²⁵National Conference of Professors of Education Administration, Problems and Issues in Public School Finance (New York: Columbia University, 1952), pp. 210-211.

²⁶William E. Rosenstengel and Jefferson N. Eastmond, School Finance--Its Theory and Practice (New York: The Ronald Press Company, 1957), p. 91.

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TABLE 10.--Current bases for allocating State aid funds for transportation in the 44 States that provide specific State support for this service, 1963^{1/}

Basis for allocating State aid funds	States employing this method
Flat grant	Iowa, Kansas
Flat percentage of cost ^{2/}	Colorado, Connecticut, ^{3/} Maine, ^{3/} Nevada, New Jersey, Rhode Island, Wyoming
Approved actual or average expenditure	Alaska, ^{4/} Delaware, Massachusetts, ^{5/} Missouri, North Carolina, Pennsylvania, ^{6/} South Carolina
Formula ^{7/}	Alabama, Arkansas, Florida, Georgia, Indiana, Kentucky, Louisiana, ^{8/} Mississippi, New Mexico, North Dakota, Oklahoma, Tennessee, Texas, Virginia, West Virginia
Flat grant and flat percentage of cost	Minnesota (in some cases)
Flat grant, approved actual or average expenditure, and formula	Wisconsin
Flat percentage of cost, approved actual or average expenditure and formula	California, ^{6/} Idaho ^{2/}
Flat percentage of cost and formula	Illinois, Montana, Oregon, Utah, Washington
Approved actual or average expenditure and formula	Maryland, Michigan, New York, ^{5/} Ohio

^{1/}Arizona, Hawaii, Nebraska, New Hampshire, South Dakota and Vermont do not provide State aid.

^{2/}Sometimes with a top limit or ceiling.

^{3/}Variable.

^{4/}Approved contract.

^{5/}Minus local contributions.

^{6/}Superintendent of Public Instruction must approve cost. Uses formula to determine excessive expense.

^{7/}Sometimes used only to calculate ceiling on cost or payment.

^{8/}Formula is only used to compute the minimum salary schedule for school bus drivers.

^{9/}Ninety per cent of difference between allowable costs and required local levy according to formula.

Source: John B. Murray, "Characteristics of State Plans for Financing Pupil Transportation," Office of Education, United States Department of Health, Education, and Welfare (Washington: Office of Education, 1963).

Pupil Transportation State Aid Formulas

One of the major difficulties confronting the State departments of education has been the development of a sound method for determining a reasonable and equitable basis for allocating State aid allowance for pupil transportation.²⁷

As a result of the limitations inherent in many of the earlier methods States employed to finance pupil transportation, such as per pupil flat grant allowances, matching State aid allowances, or allowances based on a percentage of the cost of the program, a number of States sought to develop State aid formulas for the more equitable distribution of State support. These State aid formulas were viewed as a means by which a State could determine, in a more equitable manner, local need and ability according to a prescribed and predetermined set of criteria.

The various State aid formulas are designed primarily to measure justifiable costs, and in several of the formulas the actual cost of the program at the local level represents a direct factor in computing the State aid allowance. State aid formulas vary as to the number of factors to be taken into consideration in calculating the allowance for pupil transportation.²⁸ Most of these formulas, however, take into consideration such factors

²⁷Ibid., p. 90.

²⁸Table 12, p. 79.

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as the number of pupils transported, the number of school buses utilized, the number of bus miles traveled, density, road conditions, and the depreciation of equipment.²⁹

The advantages of being able to allocate State transportation aid on the basis of an objective formula that could incorporate a number of factors which influence the need for and the cost of operating programs at the local level appealed immediately to a number of earlier researchers in this field and eventually to State education agencies and State legislatures grappling with this problem, with the result that pupil transportation allowances are now calculated on the basis of a special formula in a number of States.³⁰ As a matter of fact, a majority of the States, or approximately twenty-seven of the forty-four States that provide State transportation aid, calculate their State aid allowances to some extent according to a prescribed State aid formula. The complexity of these formulas varies considerably among the States. Although much progress toward the development of an equitable State aid formula has been made over the years, it is doubtful that there is currently in existence a formula which may not in some respect be improved.³¹

Some current State formulas, for example, require an onerous amount of record-keeping and reporting, while

²⁹Ibid.

³⁰Rosenstengel and Eastmond, op. cit., p. 90.

³¹Department of Rural Education, op. cit., p. 24.

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others involve the rendering of subjective judgments. Some formulas may work equitably in a majority of the districts in a State, but there are the exceptions, where for a number of reasons local costs are either unusually low or high.³²

It is extremely difficult to develop and incorporate a formula in the State aid plans for financing pupil transportation which provides a reasonable State aid allowance for the poorest district within a given State and at the same time avoids waste and inefficiency in the relatively wealthy districts.³³

In those districts required to provide transportation, budgetary inequalities and the possibility of the service's imposing a financial burden on the instructional program may occur if additional State aid allowance is not provided for this service beyond the basic minimum State level of general educational support.

In many school systems, the current expenditure for pupil transportation is second only to the expenditure for teachers' salaries.³⁴ In certain very sparsely populated rural areas where a high percentage of the total budget is required for this one service alone, some school districts spend as much as 25 per cent of the total school

³²Ibid.

³³Ibid.

³⁴Henry H. Lynn, School Business Administration (New York: The Ronald Press Company, 1956), p. 497.

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budget for pupil transportation. Those States that do not specifically provide State aid for pupil transportation apparently assume that the allocation of general State aid grants will enable local districts to adequately finance this service.³⁵

Factors Affecting the Cost
of the Service

Numerous studies have been conducted over the last two decades in attempts to determine those factors that affect the cost of pupil transportation and particularly those that should be considered in arriving at a method of giving adequate financial aid to local school districts.

One of the outstanding authorities on pupil transportation in the United States said, "If all factors affecting the cost of pupil transportation were combined into one formula to distribute aid to local school districts, it would be so complicated as to be impractical to apply."³⁶ Nonetheless, it has been conclusively determined that there are definite relationships between certain factors and costs. An example would be road conditions and the cost of operation. The number of pupils transported per square mile of area served has been very closely correlated with the per pupil cost of transportation. It

³⁵Johns and Morphet, op. cit., p. 176.

³⁶State Department of Education, Division of Pupil Transportation, A Proposed Transportation Formula (Frankfort, Kentucky: State Department of Education, 1958), p. 5.

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would appear that some primary factors, therefore, must necessarily be used in calculating the transportation need.

Table 11 indicates those factors which were considered to be important predictors of the cost of providing school transportation services at the local level according to a number of early researchers in the field. The table also indicates the extent to which certain authorities writing in the field have accepted the findings of this research.

In spite of the obvious influence that the density concept has had on State aid plans and formulas for financing pupil transportation since the late 1920's and early 1930's and up to the present time, there has been some move away from the single factor approach (density) in measuring transportation need and/or cost, and a more general acceptance of the multiple factor approach, as reflected in the research and writing in the field. In other words, although density as advocated by Mort, Burns, and Johns was still generally accepted as an important factor in measuring or predicting pupil transportation cost, there was more general acceptance that density did not necessarily represent the only significant factor and that in all probability no one single factor could be accepted exclusively as "the one" accurate measure of pupil transportation need and cost in allocating State aid funds for this service.

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TABLE 11.--Factors cited as important predictors of the cost of pupil transportation by certain selected authorities, 1930-60

Cost factor	Selected authorities										
	Lambert ¹ / Morphet	Johns ² / and Morphet	Rosenstengel ³ / and Eastmond	Burke ⁴	Reeder ⁵	Butterworth ⁶ / and Rueggsegger	Roberts ⁷ / ⁸ / Arkansas	Evans ⁹ / ² / California	Amis ¹⁰ / ¹⁰ / New York	Noble ¹¹ / ¹¹ / North Carolina	Hutchins ¹² / ¹² / Ohio
FACTOR RELATIVE TO THE TOPOGRAPHY OF THE SCHOOL DISTRICT											
Land use and nature of housing	X	--	--	X	--	--	--	X	--	--	--
FACTORS RELATIVE TO THE LOCAL ROAD SYSTEM											
Type of road	--	--	--	--	--	X	--	X	--	X	X
Road condition	--	X	X	X	--	--	--	--	--	--	--
Road and highway system	X	--	--	X	--	--	--	--	--	--	--
FACTORS RELATIVE TO THE SCHOOL DISTRICT ORGANIZATION											
Location of schools in relationship to population centers	--	--	--	X	--	--	--	X	--	--	--
Number, type and size of school buildings	--	--	--	X	--	--	--	--	--	--	--
FACTORS RELATIVE TO DENSITY	--	X	X	X	--	--	--	--	--	--	X
FACTORS RELATIVE TO THE NUMBER OF PUPILS TRANSPORTED	X	X	--	--	--	X	X	X	X	X	X
FACTORS RELATIVE TO SCHEDULING AND ROUTING											
Full utilization of capacity	--	--	X	--	X	X	--	--	--	X	X
Length of bus routes	X	X	X	X	--	X	X	X	X	--	--
Number of trips per bus	--	--	--	X	--	--	--	--	--	--	X
Number of trips per day	--	--	--	--	--	--	X	--	--	--	--
Time required to traverse route	X	--	--	--	--	--	--	--	--	--	--
Efficiency of routing	--	--	--	X	--	--	--	--	--	--	--
Number of routes	--	--	--	--	X	--	--	--	--	--	--
Number of bus stops	--	--	--	--	--	--	--	--	--	--	--
FACTORS RELATIVE TO DRIVERS' SALARIES											
Age of bus drivers	--	--	--	--	--	--	X	--	--	--	--
Occupation of bus drivers	--	--	--	--	X	--	X	--	--	--	--
Wages of drivers	--	--	--	X	--	--	--	--	X	--	--
Drivers	--	--	X	--	--	--	--	--	--	--	--
Economic conditions	--	--	--	--	--	--	X	--	--	--	--
Location and avail- ability of competent drivers	--	--	--	--	--	--	--	--	--	--	--
FACTORS RELATIVE TO SCHOOL BUS EQUIPMENT											
Ownership	--	--	--	X	--	X	X	X	X	X	X
Cost of equipment (new buses)	--	--	--	--	X	X	X	X	X	--	--
Age of bus	--	--	--	--	--	--	--	--	--	--	--
Average number of bids	--	--	--	--	X	--	--	--	--	--	X
Method of purchasing equipment and supplies	--	--	X	X	--	--	--	--	--	--	--
Proper equipment	--	--	X	--	--	--	--	X	--	--	--
Capacity of vehicle	X	--	X	X	X	--	--	X	X	X	--
Make and type of bus	--	--	X	--	--	--	--	--	--	X	--
Maintenance of equipment	--	--	X	X	--	--	--	--	--	--	--
Average investment per pupil	--	--	--	--	--	--	--	--	--	--	X
FACTORS RELATIVE TO CLIMATIC CONDITIONS											
Weather conditions	--	--	--	--	--	--	--	--	--	--	--
Amount of snowfall	--	--	--	--	--	--	--	--	--	--	--

¹Asael C. Lambert, *School Transportation*. (California: Stanford University Press, 1938), p. 118.

²Roe L. Johns, and Edgar L. Morphet, *Financing the Public Schools*. (New Jersey: Prentice-Hall, Inc., 1960), p. 349.

³William E. Rosenstengel, and Jefferson N. Eastmond, *School Finance--Its Theory and Practice*. (New York: The Ronald Press Company, 1957), p. 113.

⁴Arvid J. Burke, *Financing Public Schools in the United States*. (Rev. ed.; New York: Harper & Brothers, 1957), pp. 618-19.

⁵Ward G. Reeder, *The Administration of Pupil Transportation*. (Ohio: The Educators' Press, 1939), pp. 196-97.

⁶Julian E. Butterworth, and Virgil Rueggsegger, *Administering Pupil Transportation*. (Philadelphia: Educational Publishers, Inc., 1941), pp. 126-27.

⁷Source: Factors cited in important early studies according to Julian E. Butterworth, and Virgil Rueggsegger, *Administering Pupil Transportation*. (Philadelphia: Educational Publishers, Inc., 1941), pp. 122-23.

⁸Roy W. Roberts, *An Analysis of the Cost of Pupil Transportation in Arkansas*. (Arkansas: University of Arkansas, April 1935).

⁹Frank O. Evans, *Factors Affecting the Cost of School Transportation in California*. (Washington: Government Printing Office, 1930).

¹⁰Otis C. Amis, *An Analysis of Factors Affecting the Cost of Transportation in the Central Rural School Districts of New York State*. (New York: Cornell University, 1939).

¹¹M. C. S. Noble, Jr., *Public School Bus Transportation in North Carolina*. (Raleigh: State Department of Public Instruction, 1930-31).

¹²Clayton D. Hutchins, *The Distribution of State Funds for Pupil Transportation*. (Ohio: Ohio State University Press, 1938).

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For example, the factor listed in the previous table, the "occupation of drivers," may not seem to be a promising factor with regard to influence upon cost until one learns that drivers, in this particular study, were classified as "patrons," "pupils," and "teachers," and that the compensations of these varied markedly. As a matter of fact, this was merely another way of indicating "wages of driver" as a significant factor in the over-all cost of operating the program at the local level. The following factors, then, it is quite generally agreed, are worthy of recognition in any State aid formula for financing pupil transportation: (1) number of pupils transported, (2) seating capacity of vehicle, (3) length of bus route, (4) ownership of bus, (5) cost of equipment and depreciation, (6) type of road, and (7) salaries. Most studies made in recent years have been directed toward the development of a formula of the more simple design. Current State aid formulas generally reflect an acceptance of the importance of the relationship between certain factors and the cost of operating a school transportation program at the local level, as is indicated in Table 12.

Enormous amounts of energy have gone into studies to determine the influence of certain factors on transportation costs. It is interesting to note in this connection that quite likely a certain factor or given set of factors will not have exactly the same influence

TABLE 12.--The extent to which State aid formulas in the 27 States that distribute State support for transportation on the basis of a formula currently recognize certain factors in determining the transportation needs of local school units, 1963

Factors used in computing State aid allowance	States which recognize factor in State aid formula
Number of pupils	Alabama, Alaska, Arkansas, Colorado, Connecticut, Delaware, Florida, Georgia, Idaho, Illinois, Indiana, Iowa, Kansas, ¹ / ₂ Kentucky, Massachusetts, Michigan, ² / ₅ Minnesota, Mississippi, Missouri, Montana, New Mexico, North Dakota, Ohio, Oklahoma, Tennessee, Texas, Virginia, West Virginia, Wisconsin
Number of buses	Arkansas, Louisiana, Montana, New Mexico, Texas, Virginia
Number of bus miles	Colorado, Illinois, Indiana, ² / ₃ Louisiana, Maryland, Michigan, ¹ / ₄ Montana, New Jersey, New Mexico, North Dakota, Ohio, Texas, Utah, Virginia, Washington, Wisconsin ² / ₅
Density of transported population	Alabama, Arkansas, Georgia, Illinois, Indiana, Kentucky, Michigan, ¹ / ₄ Mississippi, Oklahoma, Tennessee, ⁵ / ₉ West Virginia
Road conditions	Florida, Maryland, Mississippi, New Mexico, Ohio, Texas
Bus depreciation ¹ / ₇	Alabama, Arkansas, Delaware, Idaho, Illinois, Indiana, Kentucky, Maine, Maryland, Michigan, ² / ₉ Minnesota, Mississippi, New Mexico, Ohio, ² / ₇ Oregon, Pennsylvania, Tennessee, Texas, Washington, Wisconsin, Wyoming
Cost experience relative to certain elements of program	Alabama, Georgia, Idaho, Iowa, Maryland, Massachusetts, Nevada, New York, Oklahoma, Oregon, Washington
Certain other additional factors are recognized in the State aid formula	Delaware, ¹⁰ / ₁₆ Florida, ¹¹ / ₁₇ Illinois, ¹² / ₁₃ Indiana, ¹³ / ₁₄ Kentucky, ¹¹ / ₁₅ Louisiana, ¹⁴ / ₂₀ Missouri, ¹⁵ / ₂₁ Montana, ¹⁶ / ₁₇ New Jersey, ¹⁷ / ₁₈ New Mexico, ¹⁸ / ₁₉ North Dakota, ¹⁹ / ₂₀ Tennessee, ²⁰ / ₂₁ Utah, ²¹ / ₂₂ Wisconsin, ²² / ₂₃

¹/Enrollment of transported pupils as of September 15.
²/Factor used in calculating both the capital outlay and operation allowances.
³/Used in calculating the sparsity factor.
⁴/Factor used in calculating the per mile allowance and the overall operation allowance.
⁵/Factor used in calculating per pupil allowance.
⁶/Population density rather than density of pupils transported is employed in formula.
⁷/Checked when bus depreciation may be included in costs on which the State will reimburse.
⁸/Calculated on the basis of an annual per seat allowance.
⁹/Separate State appropriation allocated on the basis of a State price schedule for equipment and district's valuation per child.
¹⁰/Negotiation on publicly owned buses.
¹¹/Area served.
¹²/Approved transportation programs are reimbursed by the State on the basis of either 50% of the cost of such transportation according to a State cost formula or at the rate of \$16-32 per transported pupil as determined by a State density formula whichever is less.

¹³/Pupil per bus mile. Bus depreciation is computed as a part of total operation cost. Formula also includes a wealth factor which is designed to provide more support for less wealthy school districts.
¹⁴/Length of bus.
¹⁵/Number of pupils per mile of bus route.
¹⁶/One formula for buses. One formula for individual families.
¹⁷/Includes cost of new buses.
¹⁸/Miles of route.
¹⁹/One-half cent per pupil mile.
²⁰/State aid allocation under the foundation program is based on a per capita allowance plus an amount derived from a density formula.
²¹/State aid allowance is based on the lesser of two computations: (1) an amount equal to \$2 per mile annually for the average number of miles traveled per day by each pupil who is actually transported, or (2) three-fourths of the total actual transportation cost for the State.
²²/The amount of the State aid allowance allocated under the flat grant depends on number of miles pupil is transported. Equalization aid if net cost exceeds two miles.

Source: John B. Murray, "Characteristics of State Plans for Financing Pupil Transportation," Office of Education, United States Department of Health, Education, and Welfare (Washington: Office of Education, 1963).

in all situations or even in the same situation under somewhat different circumstances or at different periods of time. For example, the question as to whether or not a particular make of bus will have an appreciable effect upon cost may depend upon a particular model of the bus in question for the simple reason that it is reasonable to believe that one model of a given make may prove to be more or less efficient than other models of that particular make. It will also depend upon the conditions under which the bus operates in a given situation. Roberts³⁷ found in his study that a negative relationship existed as to the capacity of buses inasmuch as the larger capacity did not in all cases haul correspondingly more pupils per day. It is also interesting to note that Evans³⁸ found that only in extreme cases did the size of the district appear to add substantially to the cost of transportation. He found that actually there was not a consistent relation between the cost per pupil and the size of the district except in districts with an area of more than 625 square miles. Amis³⁹ discovered that while buses making the most

³⁷Roy W. Roberts, An Analysis of the Cost of Pupil Transportation in Arkansas (Fayetteville: University of Arkansas, 1935), p. 14 and Appendix, Table 5.

³⁸Frank O. Evans, Factors Affecting the Cost of School Transportation in California (Washington: Government Printing Office, 1930), p. 38.

³⁹Otis C. Amis, An Analysis of Factors Affecting the Cost of Transportation in the Central Rural School Districts of New York State (Ithaca, New York: Cornell University, 1939), pp. 135-140.

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stops cost more per mile to operate, the cause for this higher per mile cost is probably the fact that these buses also haul more pupils over longer routes. Noble's⁴⁰ study points out that, while the daily per capita costs and the cost per mile may increase with the age of the vehicle, there is not necessarily a relationship between age of vehicle and daily cost per bus. The reason for this paradox appears to be the fact that when the average miles per day and average number of pupils transported per bus were computed it was apparent that all too often the older the bus the smaller the load carried and the shorter the distance hauled. Thus, it is quite probable that the increasing cost per pupil and per mile may often be due, not to the age of the vehicle but to the number of pupils and to the distance they are carried. Noble also points out in his study that it should be remembered that buses of the newer type are capable of carrying heavier and larger pupil loads. In fact, size of load per bus seems to be of paramount importance in determining daily per capita costs.

From the data presented in Table 11, page 77, there is evidence of considerable general agreement between certain current authorities in school finance and certain early researchers in the field as to those factors which can be considered predictors of cost of transportation.

⁴⁰M. C. S. Noble, Jr., Public School Bus Transportation in North Carolina (Raleigh: State Department of Public Instruction, 1930-31).

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One can readily see that factors pertaining to the local road system could have a direct relationship to topography of the school district, density, and even to number of pupils transported. Factors pertaining to scheduling and routing, as well as factors pertaining to perhaps even drivers' salaries and school bus equipment, to a somewhat lesser degree can be related, on the other hand, to the topography of the district, the local road systems, school district organization, density, and number of pupils transported.

Although most of the factors listed in the table may be to varying degrees uncontrollable, or at least the freedom of choice may be somewhat limited in these areas at the local level, there are beyond a doubt a number of managerial and operational choices required at the local level which could influence the over-all cost of local school transportation operation. For instance, this would be true in areas such as purchasing of school bus equipment on competitive bids, requiring that bids be submitted according to certain specifications, providing for specifications that are written in terms of the specific local needs and requirements, and the development and adoption at the local level of sound practices in purchasing such items as gasoline, oil, tires, and school bus insurance. Perhaps the development and adoption at the local level of a specific detailed plan for carrying out the preventive maintenance program and the development of otherwise sound

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local policies and procedures in such areas as routing, scheduling, and the number of authorized stops per route and ownership of equipment would also prove productive.

Requirements to Qualify for
State Transportation Aid

Although the specific requirements to qualify for State transportation aid may vary somewhat both as to kind and degree in the fifty States, a majority of the States do incorporate into their State plans for financing school transportation certain specific requirements pertaining in the main to such areas as: the eligibility of transported pupils, the required periodic filing of certain State records and reports or the adherence to certain State standards in regard to the purchasing and maintenance of equipment, the selection and training of personnel, and certain operating procedures at the local operational level.

Table 13 indicates that, of the forty-four States which now allocate State transportation aid, thirty-six States prescribe some distance requirement relative to the eligibility of pupils for State aid support under the State plan for financing pupil transportation. A majority of the States also require local administrative units to meet certain other State requirements in order to qualify for State aid.

One of the characteristics which has long distinguished school transportation in certain respects has been

TABLE 13.--Specific State requirements that local administrative units must adhere to in order to qualify for State transportation aid, 1963

State requirements	States which require local administrative units to meet certain State requirements in order to qualify for State transportation aid
DISTANCE	
Elementary school pupils Less than 1 mile	California (grades K-3)
1 mile	California (grades 4-8), Colorado, Delaware, Iowa, ^{1/} Kentucky, Louisiana, Minnesota, Mississippi, Missouri, Ohio, Oregon
1-1/2 miles	Alaska, Georgia, Idaho, Illinois, Indiana, Massachusetts, Michigan, New Mexico, New York, North Carolina, Oklahoma, Pennsylvania, South Carolina, Tennessee, Utah
2 miles	Alabama, Arkansas, Florida, New Jersey, Texas, Washington, West Virginia, Wisconsin
Over 2 miles	Kansas, Montana
Secondary school pupils	
1 mile	Colorado, Iowa, ^{2/} Kentucky, Louisiana, Minnesota, Mississippi, Missouri, Ohio, Oregon
1-1/2 miles	Alaska, Georgia, Idaho, Illinois, Indiana, Massachusetts, Michigan, New Mexico, New York, North Carolina, Oklahoma, Pennsylvania, South Carolina, Tennessee
2 miles	Alabama, Arkansas, California (grades 9-12), Delaware, Florida, Texas, Utah, Washington, West Virginia, Wisconsin
Over 2 miles	California (grades 13-14), Montana, New Jersey
OTHER	
Must comply with all State requirements	Idaho, Iowa, Nevada
Must comply with specific State regulations relative to: Drivers	Delaware, Illinois, Minnesota, Mississippi, Missouri, Montana, New Mexico, Tennessee
Approved equipment	Alabama, Alaska, Arkansas, Delaware, Illinois, Minnesota, Mississippi, Missouri, Montana, New Mexico, New York, Ohio, Oregon, Pennsylvania, Tennessee, Virginia, Washington, West Virginia, Wisconsin
Operating procedures	Illinois, Minnesota, Mississippi, New Jersey, Pennsylvania
Certain required reports	Alaska, Arkansas, Florida
Approved routes	Michigan, Missouri, Montana, New Mexico, New York, North Carolina, Oklahoma, Texas, Washington, Wisconsin
Eligibility of transported pupils	Florida, Michigan, Rhode Island, Texas
Operating costs	Colorado, Indiana, Maine, Michigan, New Jersey, New York, Tennessee
Letting contracts	New Mexico, New York, Pennsylvania
Maintenance of equipment	North Carolina

^{1/}Elementary pupils residing within the limits of any village, town, city, or rural independent, rural township, or consolidated district not operating a school must live more than 2 miles from the school to be entitled to transportation.

^{2/}Secondary school pupils residing in a district containing a city of 20,000 population or over must live more than 3 miles from high school to be entitled to transportation.

Source: John B. Murray, "Characteristics of State Plans for Financing Pupil Transportation," Office of Education, United States Department of Health, Education, and Welfare (Washington: Office of Education, 1963).

NOTE: The following table represents the total number of students in each of the following categories in 1955.

State representation	Number of students
Alabama (grades 1-12)	1,000
Alaska (grades 1-12)	100
Arizona (grades 1-12)	1,000
Arkansas (grades 1-12)	1,000
California (grades 1-12)	1,000
Colorado (grades 1-12)	1,000
Connecticut (grades 1-12)	1,000
Delaware (grades 1-12)	100
District of Columbia (grades 1-12)	1,000
Florida (grades 1-12)	1,000
Georgia (grades 1-12)	1,000
Hawaii (grades 1-12)	100
Idaho (grades 1-12)	100
Illinois (grades 1-12)	1,000
Indiana (grades 1-12)	1,000
Iowa (grades 1-12)	1,000
Kansas (grades 1-12)	1,000
Kentucky (grades 1-12)	1,000
Louisiana (grades 1-12)	1,000
Maine (grades 1-12)	100
Maryland (grades 1-12)	1,000
Massachusetts (grades 1-12)	1,000
Michigan (grades 1-12)	1,000
Minnesota (grades 1-12)	1,000
Mississippi (grades 1-12)	1,000
Missouri (grades 1-12)	1,000
Montana (grades 1-12)	100
Nebraska (grades 1-12)	1,000
Nevada (grades 1-12)	100
New Hampshire (grades 1-12)	100
New Jersey (grades 1-12)	1,000
New Mexico (grades 1-12)	100
New York (grades 1-12)	1,000
North Carolina (grades 1-12)	1,000
North Dakota (grades 1-12)	100
Ohio (grades 1-12)	1,000
Oklahoma (grades 1-12)	1,000
Oregon (grades 1-12)	100
Pennsylvania (grades 1-12)	1,000
Rhode Island (grades 1-12)	100
South Carolina (grades 1-12)	1,000
South Dakota (grades 1-12)	100
Tennessee (grades 1-12)	1,000
Texas (grades 1-12)	1,000
Utah (grades 1-12)	100
Vermont (grades 1-12)	100
Virginia (grades 1-12)	1,000
Washington (grades 1-12)	1,000
West Virginia (grades 1-12)	100
Wisconsin (grades 1-12)	1,000
Wyoming (grades 1-12)	100

1. Elementary pupils residing within the limits of any village, town, city, or rural township, rural community, or unincorporated district not operating a school and less than 5 miles from the school to be entitled to transportation.

2. Elementary school pupils residing in a district containing a city of 25,000 population or over and less than 5 miles from high school to be entitled to transportation.

Source: Data from the Bureau of Education, Office of Statistics, Division of Statistics, Office of Education, U.S. Department of Education, Washington, D.C. (Washington, 1955).

the variation in policies, practices, and requirements from State to State. For example, several States do not have mandatory requirements as to who must be transported but merely specify that children "may be" (permissive) transported under certain conditions. Although a number of States require that children be transported under certain conditions, in some States it is left to local boards of education to decide when children should be transported. In a majority of the States the requirements of transporting high school children differ from those for elementary children. The requirement most frequently used for who may or must be transported is one of distance. At the one extreme the State of Montana does not require the transportation of children unless they live three miles from school while there are other States that require the transportation of pupils living one mile from school. Obviously local, regional climatic conditions will affect the eligibility requirement "distancewise" which a State may prescribe. Even taking into consideration this factor, however, there is still a wide disparity in practices between the States relative to the circumstances under which children shall be transported and, if transported, conditions under which they shall be eligible for State transportation aid.

State laws that govern the type, quality, and the operation of motor vehicles, including school buses, are increasing. Each year more State boards of education

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and/or State educational agencies formulate and publish rules and regulations to govern the transportation of children.

State departments, furthermore, normally establish and enforce the use of uniform records and reports. Strict adherence to State requirements relative to the type and quality of school buses and their operation and the use of uniform records, reports, and financial accounts constitute a basis and/or prerequisite, in a number of States, for local operating units to receive State transportation aid. Table 14 summarizes the characteristics currently found in the fifty State plans for financing pupil transportation.

TABLE 1h.--Characteristics of State plans for financing pupil transportation, 1963

Registration
Population
State
County

Registration
Population
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County

Registration
Population
State
County

Registration
Population
State
County

TABLE 14.--Characteristics of State plans for financing pupil transportation, 1963

State	Part of foundation program		Basis for allocating State funds					Factors in State formula for determining transportation needs of local school units							Requirements to qualify for State funds for transportation		
	Yes	No	Flat grant	Flat cost	Actual or average expenditure	Formula	Number of pupils	Number of buses	Number of bus miles	Density of transported population	Road conditions	Bus depreciation	Other	Distance-miles	Elementary	Secondary	Other requirements
1	2	3	4	5	6	7	8	9	10	11	12	13	14	15	16	17	
Alabama.....	X	-	-	-	-	X	A.D.A.	-	-	X	-	X	Cost experience.	2	over 14	2	Must be in approved vehicles. Certain reports--approved vehicles.
Alaska.....	-	X	-	-	13/	-	X	-	-	-	-	-	-	-	-	-	-
Arizona.....	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-
Arkansas.....	-	X	-	-	-	X	A.D.A.	X	-	X	-	X	-	2	2	2	Certain reports must be filed, must be in approved buses.
California.....	-	X	-	9/1/	9/	9/	-	-	-	-	-	-	-	3/4, 1-3, 4-8, 9-12	2, 9-12, 13-14	-	District must have spent proceeds of a minimum levy for transportation.
Colorado.....	-	X	-	X	-	-	A.D.A.	-	X	-	-	-	-	1	1	1	-
Connecticut.....	-	X	-	9/	-	-	A.D.M. and Sur.	-	-	-	-	-	-	-	-	-	-
Delaware.....	-	X	-	-	X	-	A.D.A.	-	-	-	-	X	Regulation on publicly owned buses.	1	2	2	Bus and driver must meet standards.
District of Columbia.....	-	-	-	-	-	-	-	-	-	-	X	-	Area served.	2	2	2	Pulse reports on students' response allocation.
Florida.....	X	-	-	-	-	X	A.D.A.	-	-	-	X	-	Cost experience.	14	-	14	-
Georgia.....	X	-	-	-	-	X	A.D.A.	-	-	X	-	-	-	-	-	-	(Note: School transportation costs are covered by various counties.)
Idaho.....	-	-	-	-	-	-	-	-	-	-	-	-	-	14	-	14	Program must comply with all legal requirements as set forth by the State Board of Education.
Illinois.....	X	-	-	9/	9/	9/	A.D.S.	-	-	-	-	X	Allowable cost includes maintenance, and operation of equipment (salaries, insurance, etc.)	14	-	14	Must meet standards for buses, drivers, and operating procedures.
Indiana.....	-	X	-	X	-	X	A.D.A.	-	X	X	-	X	Approved transportation program are reimbursed by the State on the basis of either 50% of the cost of each transportation according to a State cost formula or at the rate of \$15-25 per transported pupil as determined by a State density formula whichever is less.	14	-	14	-
Iowa.....	-	-	-	-	-	-	-	-	-	-	-	-	Pupils per bus mile. Bus depreciation is computed as a part of total operating cost. Formula also includes a wealth factor which is designed to provide more support for less wealthy school districts.	over 14	over 14	over 14	1957 legislation from per pupil distribution to average for 1955-56 and 1956-57 school years.

TABLE 14.--Continued

STATE	Part of foundation program	Basis for allocating State funds						Factors in State formula for determining transportation needs of local school units						Requirements to qualify for State funds for transportation			
		Yes	No	Flat grant	Flat % of cost	Approved actual or average expenditure	Formula	Number of pupils	Number of buses	Number of bus miles	Density of transported population	Road conditions	Bus depreciation	Other	Distance-miles		Other requirements
															1	2	
1		2	3	4	5	6	7	8	9	10	11	12	13	14	15	16	17
Alabama.....	-	X		X		-	-	A.D.T.	-	-	-	-	-	A per pupil per annum flat grant reimbursement not to exceed actual cost.	1 or 2 10/	1 or 3 11/	Must comply with all legal requirements and with all regulations of the State Department of Public Instruction.
Arizona.....	X		X			-	-	Br. 12/	-	-	-	-	-	-	4	-	-
Arkansas.....	X					-	X	A.D.A.	-	-	X	-	X	Area served.	1	1	1960 Legislature passed a law definitely stating formula for granting State aid.
California.....	X					-	13/	-	X	X	-	-	-	Length of bus.	1	1	Bus buses purchased after 1959 must be approved by State Board of Education in order to qualify for reimbursement.
Colorado.....	-				9/	-	-	-	-	-	-	-	X	-	-	-	Let's to discretion of local board - comply per percent of cost.
Connecticut.....	X					X	X	-	-	X	-	X	X	Interest on bus cost. Driver's salary. Fixed costs. Operating costs. Maintenance costs.	-	-	-
Delaware.....	-					-	-	Not A.H.	-	8/	8/	-	***	Cost, less \$5 per year per pupil in net average membership.	14	14	Transportation must be on approved routes. Per capita State aid allowance limited to actual cost not to exceed \$60. Pupils must live outside village or city limits.
District of Columbia.....	X					X	X	*/X	-	-	-	-	-	-	-	-	-
Florida.....	-					-	-	A.D.T.	-	-	-	-	X	-	1	1	Must meet standards for buses and drivers and observe operating regulations.
Georgia.....	X					-	X	A.D.A.	-	-	X	X	X	Number of pupils per mile of bus route.	1	1	Must meet standards for buses and drivers. Must submit plans and proposals for operation of buses.
Idaho.....	X				X	-	-	A.D.A.	-	-	-	-	-	Number of pupils per mile of bus route. One formula for buses. One formula for individual families.	1	1	Must meet requirements for vehicles, drivers, and routes.
Illinois.....	-					-	X	X	X	X	-	-	-	-	3	3	Must meet standards for buses and drivers.
Indiana.....	-					-	-	-	-	-	-	-	-	-	-	-	-
Iowa.....	-					-	-	-	-	-	-	-	-	Based on elements of operating costs such as salaries, gas, oil, etc., but excluding cost of new buses.	-	-	Must comply with all legal requirements and with all regulations of the State Department of Education.
Kansas.....	-					-	-	-	-	-	-	-	-	-	-	-	-
Kentucky.....	-					-	-	-	-	-	-	-	-	-	-	-	-
Louisiana.....	-					-	-	-	-	-	-	-	-	-	-	-	-
Maine.....	-					-	-	-	-	-	-	-	-	-	-	-	-
Maryland.....	X					-	-	-	-	-	-	-	-	-	-	-	-
Massachusetts.....	-					-	-	-	-	-	-	-	-	-	-	-	-
Michigan.....	-					-	-	-	-	-	-	-	-	-	-	-	-
Minnesota.....	-					-	-	-	-	-	-	-	-	-	-	-	-
Mississippi.....	-					-	-	-	-	-	-	-	-	-	-	-	-
Missouri.....	-					-	-	-	-	-	-	-	-	-	-	-	-
Montana.....	-					-	-	-	-	-	-	-	-	-	-	-	-
Nebraska.....	-					-	-	-	-	-	-	-	-	-	-	-	-
Nevada.....	-					-	-	-	-	-	-	-	-	-	-	-	-
New Hampshire.....	-					-	-	-	-	-	-	-	-	-	-	-	-

TABLE 11.--Continued

State	Part of funds for program	Funds for allocating State funds						Factors in State formula for allocating transportation needs of local school utility			Requirements to qualify for State funds for transportation		
		Per cent of funds available	Per cent of State funds available	Per cent of State funds available	Per cent of State funds available	Per cent of State funds available	Per cent of State funds available	Per cent of State funds available	Per cent of State funds available	Per cent of State funds available	Per cent of State funds available	Per cent of State funds available	Per cent of State funds available
1	2	3	4	5	6	7	8	9	10	11	12	13	14
New Jersey.....	-	-	-	-	-	-	-	-	-	-	-	-	-
New Mexico.....	-	-	-	-	-	-	-	-	-	-	-	-	-
New York.....	-	-	-	-	-	-	-	-	-	-	-	-	-
North Carolina.....	-	-	-	-	-	-	-	-	-	-	-	-	-
North Dakota.....	-	-	-	-	-	-	-	-	-	-	-	-	-
Ohio.....	-	-	-	-	-	-	-	-	-	-	-	-	-
Oklahoma.....	-	-	-	-	-	-	-	-	-	-	-	-	-
Oregon.....	-	-	-	-	-	-	-	-	-	-	-	-	-
Pennsylvania.....	-	-	-	-	-	-	-	-	-	-	-	-	-
Rhode Island.....	-	-	-	-	-	-	-	-	-	-	-	-	-
South Carolina.....	-	-	-	-	-	-	-	-	-	-	-	-	-
South Dakota.....	-	-	-	-	-	-	-	-	-	-	-	-	-
Tennessee.....	-	-	-	-	-	-	-	-	-	-	-	-	-

1. Excludes cost of new buses.
2. Buses of State school utility.
3. Buses of State school utility.
4. Buses of State school utility.
5. Buses of State school utility.
6. Buses of State school utility.
7. Buses of State school utility.
8. Buses of State school utility.
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10. Buses of State school utility.
11. Buses of State school utility.
12. Buses of State school utility.
13. Buses of State school utility.
14. Buses of State school utility.

CHAPTER IV

CRITERIA FOR EVALUATING STATE PLANS FOR FINANCING PUPIL TRANSPORTATION

As an important aspect of this study, a list of twelve criteria which with one exception--Criterion Number 12--basically represent those developed by Covert,¹ was submitted to the fifty State directors of pupil transportation for evaluation. The fifty directors were asked: (1) to express an opinion on whether or not each of the twelve criteria should be recognized in a State plan for financing pupil transportation, and (2) to indicate whether or not their State plans for financing pupil transportation did in fact recognize each criteria and if so the means by which this was accomplished.

The instrument² used in surveying the opinions of the fifty State pupil transportation directors contained the following instructions: "After careful study of all the criteria listed in Section I, please indicate in Section II, Tables 1 and 2, any criterion which, in your opinion, should be added to this list, dropped, or

¹Timon Covert, State Plans for Financing Pupil Transportation, Federal Security Agency, United States Office of Education, Pamphlet No. 99 (Washington: Government Printing Office, 1946).

²Appendix C.

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modified." References made to individual responses in this chapter are included in the Appendix in their entirety.

The Evaluating Criteria

The twelve evaluating criteria employed in this study fall in two general categories or groupings. Eight of the criteria, Numbers 1, 2, 3, 4, 8, 11, 6, and 9, hereafter referred to as Group I Criteria, pertain to assessing the State plan's over-all adequacy and equitableness. Four of the criteria, Number 5, 10, 12, and 7, hereafter referred to as Group II Criteria, pertain to assessing the State plan's provisions for stimulating the attainment of desirable goals and standards.

Within each of these two categories specific criteria were further organized into certain groupings. The Group I Criteria were organized under the following subheadings: (a) sufficient State support containing criteria 1 and 2; (b) provision for capital outlay containing criteria 3 and 4; (c) cost factors considered in the formula containing criterion 8; (d) an objective State aid formula containing criterion 11; (e) flexibility of the plan containing criterion 6; and (f) subsistence in lieu of transportation containing criterion 9. Likewise the Group II Criteria were organized under such subheadings as: (a) safe, efficient, and economical programs containing criterion 5; (b) desirable school district organization containing criterion 10; (c) broadening and

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extending the educational program containing criterion 12; and (d) adequate records and reports containing criterion 7. This organization of the criteria took place sometime after the survey instrument had been returned by the recipients; and as a result, the original numbered sequence of the twelve criteria was distributed as is evident in the listing of the twelve criteria within the two aforementioned groups. Table 15 summarizes the responses of the State school transportation directors concerning the twelve criteria submitted to them for evaluation.

Group I Criteria--Assessing the State Plan's
Over-all Adequacy and Equitableness

The following represents the responses of the State directors of pupil transportation as to the acceptability of certain criteria in assessing the adequacy and equitableness of a State plan for financing pupil transportation.

Sufficient State support.--A State plan for financing pupil transportation should:

Provide sufficient funds to enable local units with reasonable local effort to operate safe, economical, and efficient systems of transportation. (Criterion Number 1)

Tend to compensate for the additional financial burden that falls upon school districts which must provide pupil transportation. (Criterion Number 2)

The State directors in forty-three States accepted

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TABLE 15.--The acceptability and recognition of certain selected criteria in State plans for financing pupil transportation in the 50 States, 1963

Group I Criteria	Acceptability of certain criteria in evaluation by the 50 State directors of pupil transportation				The means by which criteria are currently recognized in the 50 State plans for financing pupil transportation			
	Acceptable	Acceptable in part	Not acceptable	No opinion expressed	Statute and/or State aid formula	Administrative rules and regulations (including standards)	Recommended practices encouraged through State leadership activities	No data reported
<u>Sufficient State support</u>								
A State plan for financing pupil transportation should:								
1. Provide sufficient funds to enable local units, with reasonable local effort to operate safe, economical, and efficient systems of transportation for all pupils who should be transported	43	1/4	-	3	2/36	15	9	3/8
2. Tend to compensate for the additional financial burden that falls upon school districts which must provide pupil transportation	37	7	2	4	31	12	9	3/12
<u>Provisions for capital outlay</u>								
A State plan for financing pupil transportation should:								
3. Take into account provisions for capital outlay expenditures, such as the purchase of school buses, bus equipment, and the erection of bus shops	30	4/51	6	3	6/125	8/11	2/11	3/17
4. Provide for amortization of capital outlay expenditures of school buses and school bus garages beyond the current year	10/30	9	8	3	11/20	13	7	3/21
<u>Cost factors included in the formula</u>								
A State plan for financing pupil transportation should:								
8. Provide for consideration of factors beyond the control of local units, such as population density, road conditions, and geographical barriers	27	16	4	3	21	13	12	3/16
<u>An objective State aid formula</u>								
A State plan for financing pupil transportation should:								
11. Provide for distribution of State aid upon the basis of an objective formula	47	-	-	3	35	11	4	3/13
<u>Flexibility of the plan</u>								
A State plan for financing pupil transportation should:								
6. Permit at the local level ready flexibility in making adjustments in the transportation program, such as in case of consolidation and fires	41	3	1	5	18	20	14	3/11
<u>Subsistence in lieu of transportation</u>								
A State plan for financing pupil transportation should:								
9. Provide for subsistence for pupils in lieu of transportation within reasonable limitations	31	7	8	4	12/25	12	4	3/17

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TABLE 15.--Continued

Group II Criteria	Acceptability of certain criteria in evaluation by the 50 State directors of pupil transportation				The means by which criteria are currently recognized in the 50 State plans for financing pupil transportation			
	Acceptable	Acceptable in part	Not acceptable	No opinion expressed	Statute and/or State aid formula	Administrative rules and regulations (including standards)	Recommended practices encouraged through State leadership activities	No data reported
<u>Safe, efficient, and economical programs</u>								
A State plan for financing pupil transportation should:								
5. Tend to stimulate the attainment of desirable standards in school bus equipment, maintenance operation, and the employment of personnel	45	2	-	3	21	29	18	3/7
<u>Desirable school district organization</u>								
A State plan for financing pupil transportation should:								
10. Not tend to discourage desirable reorganization of local units and attendance areas	45	2	-	3	12	19	21	3/14
<u>Broadening and extending the education program</u>								
A State plan for financing pupil transportation should:								
12. Encourage schools to broaden and extend the school program through the use of school buses	34	11	1	4	17	20	15	3/14
<u>Adequate records and reports</u>								
A State plan for financing pupil transportation should:								
7. Require the local school district or local administrative unit to maintain adequate accounting records and reports	44	2	-	4	17	27	14	3/10

1/Wyoming reported acceptable with respect to public schools only.

2/Kansas recognizes criteria in "Statute and/or State aid formula" to some degree.

3/Includes six States which do not allocate State aid for transportation and one State in which entire cost of transportation program borne by State.

4/Criterion acceptable if equipment is district owned and operated--Minnesota.

5/Acceptable in North Carolina for buses and equipment only.

6/Georgia recognizes criterion in "Statute and/or State aid formula" for school buses only.

7/Massachusetts recognizes criterion in "Statute and/or State aid formula" for buses and equipment only.

8/Massachusetts recognizes criterion in "Administrative rules . . ." only in certain cases.

9/Georgia recognizes criterion in "Recommended practices . . ." relative to shop and equipment only.

10/Nebraska, criterion acceptable but not beyond current year.

11/Massachusetts recognizes criterion in "Statute and/or State aid formula" for buses only.

12/"Statute and/or State aid formula" applicable in Kansas only in regard to special education.

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Criterion Number 1 as an important consideration in evaluating a State plan for financing pupil transportation, while the directors in four States accepted it in part. Three State directors expressed no opinion.

The State directors in thirty-seven States indicated that Criterion Number 2 was acceptable, while the directors in seven States accepted it in part. The State directors of two States indicated that Criterion Number 2 was not acceptable primarily because it overlapped certain other criteria. Four State directors expressed no opinion.

Provision for capital outlay.--A State plan for financing pupil transportation should:

Take into account provisions for capital outlay expenditures, such as the purchase of school buses, bus equipment, and the erection of bus shops.

(Criterion Number 3)

Provide for amortization of capital outlay expenditures of school buses and school bus garages beyond the current year. (Criterion Number 4)

The State directors in thirty States found Criterion Number 3 acceptable as an important consideration in evaluating a State plan for financing pupil transportation; the directors in eleven States found this Criterion acceptable in part. Three State directors expressed no opinion. The State directors in thirty States indicated Criterion 4 was acceptable, while the directors in nine States found this Criterion acceptable in part. Three expressed no

opinion. Six State directors indicated that Criterion 3 was not acceptable, while eight State directors took the same position in regard to Criterion 4.

The reasons given by approximately one-half of the State directors³ for not accepting Criteria 3 and 4 included: "Too difficult to administer," "State aid for capital outlay could result in excessive expenditures unless safeguards are required," "Could lead to deficit spending," "Acceptable relative to school bus equipment but not school bus garages," "School bus garages might rather be included in school plant construction than in transportation costs."

Cost factors considered in the formula.--A State plan for financing pupil transportation should:

Provide for consideration of factors beyond the control of local units such as population density, road conditions, and geographical barriers. (Criterion Number 8)

The State directors in twenty-seven States found Criterion Number 8 acceptable as an important consideration in evaluating a State plan for financing pupil transportation. The directors in sixteen States found that Criterion 8 was acceptable only in part but gave no reasons for that response. Four directors indicated that Criterion 8 was not acceptable, while three State directors

³Appendix C contains additional comments submitted by the State directors relative to selected criteria for evaluating State plans for financing pupil transportation.

expressed no opinion. One could reasonably assume that any enumeration of factors that influence the cost of transportation would to a certain extent be controversial and thus attract a certain number of negative responses. On the other hand, as indicated in Table 15, the large number of acceptable-in-part responses of any sort, along with those responses acceptable without qualification, may in fact reflect strong support for this particular criterion.

An objective State aid formula.--A State plan for financing pupil transportation should:

Provide for distribution of State aid upon the basis of an objective formula. (Criterion Number 11)

The State directors in forty-seven States found Criterion Number 11 acceptable as an important consideration in evaluating a State plan for financing pupil transportation. The directors in the three remaining States expressed no opinion, either pro or con, as to the acceptability of this criterion.⁴

Flexibility of the plan.--A State plan for financing pupil transportation should:

Permit at the local level ready flexibility for making adjustments in the transportation program in such cases as consolidation, fires, etc. (Criterion Number 6)

The State directors in forty-one States found

⁴Arizona, Colorado, and South Carolina, Appendix C.

Criterion Number 6 acceptable as an important consideration in evaluating a State plan for financing pupil transportation. The directors in three States found this criterion acceptable in part, and one State director indicated that the criterion was not acceptable. Five State directors expressed no opinion.

Subsistence in lieu of transportation.--A State plan for financing pupil transportation should:

Provide for subsistence of pupils in lieu of transportation within reasonable limitations. (Criterion Number 9)

The State directors in thirty-one States found Criterion Number 9 acceptable as an important consideration for evaluating a State plan for financing pupil transportation. The directors in seven States found the criterion acceptable in part, and the directors in eight States indicated that the criterion was not acceptable. Four State directors expressed no opinion.

The following comments represent, generally, the reasons for the unacceptability of this criterion in the opinion of the eight State directors: "Subsistence is responsibility of family and not of school," "We do not believe the school should be made responsible for subsistence for school children because of the distance their home is from school," "This criterion is probably necessary in some States, but is not needed in this State at the present time," "May be desirable in some States with very

sparse population." This reaction would indicate that provisions in the State plan for subsistence in lieu of transportation do not have the importance which they perhaps once did, in light of modern highways and developments in transportation.

Group II Criteria--Assessing the State Plan's
Provisions for Stimulating the Attainment
of Desirable Goals and Standards

The following summary reflects the opinions of the State directors of pupil transportation as to the acceptability of certain criteria in assessing provisions in State plans for stimulating the attainment of desirable goals and standards.

Safe, efficient, and economical programs.--A State plan for financing pupil transportation should:

Tend to stimulate the attainment of desirable standards in school bus equipment, maintenance, operation, and the employment of personnel. (Criterion Number 5)

The State directors in forty-five of the States found Criterion Number 5 acceptable as an important consideration in evaluating a State plan for financing pupil transportation and the directors in two States found the criterion acceptable in part. No State indicated that this criterion was unacceptable. Three expressed no opinion.

Desirable school district organization.--A State plan for financing pupil transportation should:

Not tend to discourage desirable organization of local administrative units and attendance areas.

(Criterion Number 10)

The State directors in forty-five of the States found Criterion Number 10 acceptable as an important consideration in evaluating a State plan for financing pupil transportation, and the directors in two States found the criterion acceptable in part. No State indicated that this criterion was unacceptable. Three expressed no opinion.

Broadening and extending the educational program.--

A State plan for financing pupil transportation should:

Encourage schools to broaden and extend the school program through the use of school buses. (Criterion Number 12)

The State directors in thirty-four of the States found Criterion Number 12 acceptable as an important consideration in evaluating a State plan for financing pupil transportation and the directors in eleven States found it acceptable in part. Only one State director felt that the criterion was unacceptable. Four expressed no opinion.

Adequate records and reports.--A State plan for financing pupil transportation should:

Require a local school district or local administrative unit to maintain adequate accounting records and reports. (Criterion Number 7)

The State directors in forty-four of the States found Criterion Number 7 acceptable as an important consideration in evaluating a State plan for financing pupil transportation and two State directors found it acceptable in part. No State reported that the criterion was unacceptable. Four State directors expressed no opinion.

Viewing the Criteria in Terms of Frequency
of Acceptance and Specific
State Recommendations

In an attempt to better understand the significance and interrelationships of the responses of the fifty State directors, the twelve criteria were tabulated in order of their frequency of acceptance. (Table 16, p. 113) This ranking may not have any particular statistical significance because of, (1) the limited universe involved, (2) some overlapping of the criteria, and (3) the relatively close grouping of the responses regarding all twelve criteria. However, on the basis of this ranking some extremely interesting speculations and observations are possible.

Ranked No. 1, it is interesting to note, is Criterion Number 11 pertaining to the desirability of an objective formula. Ranked No. 12 and last is Criterion Number 8 which pertains to the consideration in the formula of factors affecting cost. Now it is rather obvious that when State directors rated an objective formula of primary importance in a State plan for financing

pupil transportation, they should have also rated Criterion Number 8 equally high for the simple reason that one of the prerequisites for an objective formula is the incorporation into that formula of the major or primary factors affecting cost.

The reason for this apparent discrepancy is clear, however, when one recognizes first, that Criterion Number 8 received far fewer responses than Criterion Number 11; second, and perhaps more important, while the State directors agree on the desirability of distributing State aid on the basis of an objective formula, they are apparently in part unable to agree on the specific factors affecting cost that should be incorporated into the formula to insure its objectivity.

It is interesting to note the extremely worthwhile suggestion received from one of the States concerning the possible modifications of Criterion Number 11.

West Virginia

Criterion Number 11 should also provide for a periodic revision of the formula to compensate for increase or decrease of costs of services, equipment and supplies.

Ranked No. 2 by the State transportation directors is Criterion Number 5 pertaining to the stimulation of the attainment of desirable standards. This is not surprising in light of the concern of the vast majority of the States in promoting safe, economical, and efficient

programs at the local level, which in turn require State direction and guidance in terms of the development and enforcement of reasonable standards. The following suggestion received from one of the States would tend to strengthen Criterion Number 5:

Kentucky

Criterion Number 5 should require districts to maintain certain levels of service in order to receive State aid.

Also ranked in second place is Criterion Number 10 pertaining to the encouragement of desirable district organization. It should be pointed out that a large number of State directors would view desirable district organization as primarily the organization of school attendance areas with which a given school district or county administrative school unit might concern itself. Others would view school district organization as the joining of two or more independent school districts into one new school district in the sense of school district reorganization as conceived in some of the Midwestern States.

Ranked in fourth place is Criterion Number 7 pertaining to maintenance of records and reports. Ranked in fifth place is Criterion Number 1 concerning adequate State support. A number of reactions concerning suggested deletions and modifications of Criterion Number 1 follow:⁵

⁵Appendix C.

Connecticut

A State plan for financing pupil transportation should provide sufficient State funds to enable local units with reasonable local effort to operate [or to contract] safe, economical, and efficient systems of transportation for all pupils who should be transported.

Indiana

Should take into consideration financial ability of the local school district. (Equalization)

Iowa

We believe the State should not reimburse more than 50 per cent of the cost of transportation. We prefer a flat rate per pupil rather than a complicated formula which would tend to take away local control. We can control condition of equipment through annual inspections. We tried a formula containing factors listed in Criterion Number 8, but this did not prove satisfactory.

West Virginia

State funds obtained for transportation to be used for transportation only.

Ranked in sixth, seventh, and eighth positions respectively are Criterion Number 6 pertaining to program flexibility, Criterion Number 2 pertaining to equalization, and Criterion Number 12 pertaining to the extension of the educational program. Ranked ninth is Criterion Number 9.

Criterion Number 9, provision for subsistence in lieu of transportation, commanded by far the greatest number of negative responses. Reactions concerning suggested deletions and modifications of Criterion Number 9 follow:⁷

Alabama

Delete Criterion Number 9, subsistence responsibility of family.

Hawaii

We do not believe the school should ever be made responsible for subsistence for school children because of the distance their home is from school.

Iowa

This is probably necessary in some States, but it is not needed in Iowa at the present time.

Missouri

Criterion Number 9 may be desirable in some States with very sparse population.

New Jersey

Criterion Number 9 tends to discourage local districts from building adequate school facilities.

North Dakota

Although it is necessary in some cases to provide for payment in lieu of transportation, we in this State hesitate to make this a part of the State aid program. We find the greatest disregard for law in

⁷Appendix C.

supporting nonpublic schools in those districts which provide payments in lieu of transportation. Parents, and sometimes school boards, will ignore the fact that these payments cannot be made to those attending nonpublic schools.

Texas

Criterion Number 9 should provide for subsistence for pupils in lieu of transportation within reasonable limitations. We do not recognize the Criterion. Do not approve of such a procedure.

West Virginia

Criterion Number 9 should provide for the allocation of specific allowances for in-lieu transportation facilities.

Criterion Number 3, the consideration of capital outlay expenditures in the State plan for financing pupil transportation, which ranked tenth along with Criterion Number 4, elicited the following responses:⁷

Kentucky

Require districts to purchase school transportation equipment that meets definite safety specifications in order to receive State aid.

Missouri

Criterion Number 3 is too difficult to administer. State aid for capital outlay could result in excessive expenditures unless rigid safeguards were required.

⁷Appendix C.

Washington

Criterion Number 3 is important, but there must be some control prices districts pay for buses and equipment upon which they receive State reimbursement.

Comments received relative to Criterion Number 4, pertaining to the provision for amortization of capital outlay expenditure, are as follows:⁸

Alabama

Delete Criterion Number 4, could lead to deficit spending.

Missouri

Delete Criterion Number 4 because it is too difficult to administer. State aid for capital outlay could result in excessive expenditures unless rigid safeguards were required.

New Jersey

Building school bus garages might rather be included in school plant construction rather than pupil transportation cost.

Ranked in twelfth and last position is Criterion Number 8 pertaining to the consideration of factors affecting cost incorporated in the formula in the frequency of acceptance scale. The comments received relative to Criterion Number 8 are as follows:⁹

⁸Appendix C.

⁹Appendix C.

Arkansas

It would be well to include a road factor if you have control over school bus routes. We do not have such a factor in our formula.

Indiana

Criterion Number 8 should take into consideration distance from homes to school, route hazards, and age of children.

Further General Comments by the State
Directors Relative to the
Twelve Criteria

Arkansas

A road factor or a mileage factor would be a good criteria if there is some control over changes in bus routes. We have no such criteria.

Georgia

During the last two years Georgia has conducted studies in 143 of our 159 counties. This is a joint undertaking by the State department of education and county boards of education. Local administrators have had a chance to see other programs as well as their own. Common criteria have been used, thereby moving toward common practices in the administration and operation of school transportation program. So far these surveys have removed about 15 per cent of the excess mileage in our programs and reduced the average route length of the state by about 17 per cent. We believe that ultimately this will result

in more equitable treatment of all counties in the distribution of State aid by our formula. We are convinced such local studies are the foundation of a much improved school transportation program. However, it is a never ending job.

Provide for local studies of local school transportation programs to include organizing routing arrangements in accordance with needs of pupils, changes in attendance areas, consolidation of schools, expenditures and budget requirements. This points toward adequate service, equalization of education opportunities, safety, and economical and efficient operation.

Provide for the training of drivers and mechanics in the State plan for financing pupil transportation.

Indiana

Provision for the selection, training, supervision of drivers, and maintenance of equipment [should be included in the State plan for financing pupil transportation].

Iowa

We prefer the flat rate method (in our case \$30.00 per pupil per year) to a complicated formula. This leaves most of the control at the local level, but permits us to exercise supervision of buses, drivers, routes, etc., through legal provisions and administrative regulations.

Massachusetts

State grants-in-aid for transportation should be equalizing.

Missouri

Criterion Number 11 should be objective in [regard to] the factors included in the formula, but the amount of State aid should be flexible--not fixed.

New Hampshire

The importance of some of the criteria to a specific situation would need to be judged by the allowance made for other criteria. In short, they overlap considerably.

New Jersey

Provision for stimulating annual in-service training for school bus drivers should be included.

North Dakota

We believe a criterion could be added in regard to an equalization feature in providing State aid for transportation. It is our belief that a State aid formula which provides most or all of the transportation cost encourages abuse of the vehicles in a public transportation system. It is our belief that the school district should provide some of the support for transportation. In order to make public transportation available to all students, an equalization feature must be present.

Washington

It appears to us that a good plan should recognize the difference between replaced buses and additional buses caused by increase in number of children served or distance traveled.

Wyoming

In my opinion the twelve criteria listed will suffice if properly executed. There could be a possibility that too many criteria would cause confusion rather than simplicity.

The Extent to Which State Plans Currently
Recognize the Criteria

The remainder of this chapter will be devoted to:

(1) setting forth the extent to which State plans do in fact recognize the twelve criteria and the means by which this is accomplished, and (2) relating the findings in this study to the 1946 findings relative to Covert's twenty States.¹⁰

¹⁰The Covert study--1946. Covert employed a questionnaire in his study that identified eleven criteria for evaluating State plans for financing pupil transportation. This questionnaire was directed to State departments of education in order to "formulate criteria for evaluating State programs for financing pupil transportation."

Recipients of Covert's questionnaire were asked to recommend any additional criteria which should be added to the list and suggest any desirable modifications to those listed. Covert received but four replies to this invitation. Three merely stated in effect that Covert's list of criteria appeared to be quite complete and satisfactory. The fourth suggested that Covert add an additional criterion to the list which was stated as follows: Does the general plan for State support of education provide for separate calculation of aid for school transportation; or, if not a separate calculation, is the financial need of the local unit

TABLE 16.--Ranking of criteria in order of the frequency of acceptance by the 50 State directors of school transportation, 1963

Rank	Criteria	Frequency of acceptance			
		Acceptable	Acceptable in part	Not acceptable	No opinion expressed
1	Criterion Number 11--the desirability of an objective formula	47	-	-	3
2	Criterion Number 5--stimulation of the attainment of desirable standards	45	2	-	3
2	Criterion Number 10--encouragement of desirable district organization	45	2	-	3
4	Criterion Number 7--adequate records and reports	44	2	-	4
5	Criterion Number 1--adequate State support	43	$\frac{1}{4}$	-	3
6	Criterion Number 6--program flexibility	41	3	1	5
7	Criterion Number 2--equalization	37	7	2	4
8	Criterion Number 12--broadening and extending the educational program	34	11	1	4
9	Criterion Number 9--subsistence in lieu of transportation	31	7	8	4
10	Criterion Number 3--consideration of capital outlay expenditure	30	$\frac{2}{3}, \frac{3}{11}$	6	3
10	Criterion Number 4--provision for amortization of capital outlay expenditure	$\frac{4}{30}$	9	8	3
12	Criterion Number 8--consideration of factors affecting cost	27	16	4	3

1/Wyoming reported acceptable with respect to public schools only.

2/Criteria acceptable if equipment is district owned and operated--Minnesota.

3/Acceptable in North Carolina for buses and equipment only.

4/Criteria acceptable but not beyond current year--Nebraska.

It is interesting to note that in the twenty States that applied Covert's criteria to their State aid plans, eleven States, slightly more than one-half, were able to report more often than not that their State plan did meet Covert's criteria. The opposite was true in five States. The replies from two States were about evenly divided, while those from the remaining States appeared to reflect no particular pattern. Covert summarized this information in a table included in his study which is reproduced as Table 17 of this study.

so computed that it is affected by amount of transportation service rendered by local unit?

Although Covert specifically indicated in his questionnaire that the respondents need not comment upon how the criteria applied to their respective State plans, twenty did so and forwarded their remarks to Covert along with the completed questionnaire. Inasmuch as Covert felt that their evaluations were both interesting and pertinent to his study, he summarized these comments and included this information in his study. See Table 17.

The eleven criteria phrased as questions which were included in Covert's questionnaire were worded so that they could be answered in most cases by a simple "Yes" or "No." If the respondent's answer was "Yes," it implied that the criteria was satisfactory; and if the answer was "No," it implied the opposite. Qualified answers were given by the respondents to some of the questions.

TABLE 17.--Evaluation of provisions for financing pupil transportation in 20 States

State	Are enough funds available for safe, efficient, and economical service?	Are districts reimbursed for the expense of this service?	Is there adequate provision for funds for capital outlay payments?	Is there suitable provision for extending capital outlay payments?	Are safety, efficiency, and economy of operation promoted?	Is the plan flexible enough?	Is adequate accounting required?	Are such influences on cost as density of population considered?	Can payments be made for subsistence of pupils in lieu of transportation?	Are desirable administration and attendance units promoted?	Is an objective formula used in distributing the State funds?
1	2	3	4	5	6	7	8	9	10	11	12
Alabama . . .	Yes	Yes	Yes	Yes	Yes	1	Yes	2	No	Yes	Yes
Connecticut .	Yes	Yes	3	Yes	No	No	Yes	No	No	No ⁴	Yes
Delaware . . .	Yes	Yes	5	6	Yes	Yes	Yes	Yes	Yes	Yes	Yes
Florida . . .	Yes	Yes	Yes	Yes	Yes	Yes	Yes	Yes	Yes	Yes	Yes
Illinois . . .	No	---	---	---	---	---	---	---	---	No	---
Kentucky . . .	No	No	No	---	No ⁷	No	No	---	Yes	No	No
Maryland . . .	Yes	Yes ⁸	---	---	---	Yes	Yes	Yes	Yes	Yes ⁹	No
Massachusetts	---	---	---	---	---	---	---	---	Yes	---	---
Michigan . . .	Yes	Yes	9	10	Yes	Yes	Yes	Yes	Yes	Yes	No
Minnesota . .	Yes	No	9	9	Yes	Yes	Yes	No	Yes	Yes	Yes
Mississippi .	Yes	Yes	Yes	Yes	Yes	Yes	Yes	Yes	No	Yes	Yes
North Carolina	Yes	Yes	11	12	Yes	Yes	Yes	5	9	Yes	5
North Dakota .	No	9	No	No	No	No	No	No	9	No	No
Oklahoma . . .	No	Yes	9	12	Yes	9	Yes	9	No	Yes	Yes
South Carolina	No	No	13	13	No	No	No	No	No	No	No
Utah	No	No	No	No	Yes	Yes	Yes	No	Yes	---	14
Vermont	No	1	1	No	No	No	No	No	No	No	No
Virginia . . .	Yes	No	No	Yes	No	Yes	Yes	No	No	No	No
Washington . .	Yes	Yes	Yes	12	Yes	Yes	---	9	Yes	Yes	No
West Virginia	Yes	Yes	No	No	Yes	Yes	Yes	Yes	Yes	Yes	Yes

1/To a limited degree.

2/Considers factor of density.

3/For small towns only.

4/One type of school excepted.

5/State pays all of approved expense.

6/All transportation by contract.

7/Not the best.

8/In 19 counties which participate in State equalization fund.

9/In part or for some districts.

10/Reimbursement extended over a period of years.

11/Counties raise funds for capital outlay.

12/Local districts may do so.

13/Depends upon distribution of State aid within counties.

14/Items of expense in equalization program.

Source: Timon Covert, *State Plans for Financing Pupil Transportation*. Federal Security Agency, United States Office of Education, Pamphlet No. 99 (Washington: Government Printing Office, 1946), p. 44.

The following represents a comparison between the 1946 findings of Covert's twenty States and those of the survey conducted in connection with this study as to the recognition of the aforementioned criteria in State plans for financing pupil transportation.

Recognition of Criteria in State Plans
1946-1962--A Summary

<u>Findings--this study</u>	<u>Covert's twenty States</u> ¹¹
<p>Thirty-eight of the States recognized Criterion Number 1, according to the State transportation directors, through statutes and/or the State aid formula. A large number of additional States recognized the Criterion through administrative rules and regulations (including standards).</p> <p>Thirty-one of the States recognized Criterion Number 2 through statutes and/or the State aid formula, with a number of additional States recognizing the Criterion through administrative rules</p>	<p>Covert's findings in 1946 indicated that at least twelve States felt that their State plans recognized to a sufficient degree Criteria Numbers 1 and 2 and that these State plans implemented these two criteria to an adequate degree in the allocation of State transportation aid.</p>

¹¹Covert, op. cit., pp. 42-44.

Findings--this study

and regulations (including standards). It is quite obvious that in a number of States the two criteria are recognized in many different ways such as through statutes and/or the State aid formula as well as administrative rules and regulations (including standards).

In the 1963 survey it was found that twenty-five or exactly one-half of the States recognized Criterion Number 3, according to the State transportation directors, through statutes and/or the State aid formula, with a large number of additional States apparently recognizing the Criterion through administrative rules and regulations (including standards). Twenty of the States recognized Criterion

Covert's twenty States

Covert found that the State plans for financing pupil transportation in eleven of the twenty States included in his 1946 study made some provisions for capital outlay expenditures in connection with pupil transportation services. Five States reported to have no such provision; one State reported that the school transportation service was maintained entirely on a contract basis which apparently required

Findings--this study

Number 4 through statutes and/or the State aid formula with a number of additional States recognizing the Criterion through administrative rules and regulations (including standards).

The State transportation directors of twenty-one States reported that Criterion Number 8 was expressly recognized through statutes and/or the State aid formula.

Covert's twenty States

no expense for the purchase or repair of school buses, and the remaining States did not answer. Covert found that provision was made in eleven of the States in his study for extending payments for school buses and other school transportation equipment beyond the current year. Four States had no provision of this type.

It is interesting to note Covert's findings in 1946 to the effect that at least ten of the twenty States did give some consideration in the State plan for financing pupil transportation to factors beyond the control of the local school districts, such as the variation and number of pupils to be transported from a given area and road conditions.

Findings--this study

Thirty-five of the States recognized Criterion Number 11, according to the State transportation directors, through statutes and/or the State aid formula, with a large number of additional States apparently recognizing the Criterion through administrative rules and regulations (including standards).

Eighteen of the States recognized Criterion Number 6, according to the State transportation directors, through statutes and/or the State aid formula, with a number of additional States

Covert's twenty States

Covert found in 1946 that eighteen of the twenty States included in his study replied to the question, "Does the plan for financing pupil transportation provide for the distribution of State aid upon the basis of an objective formula?" Eight States answered in the affirmative, eight in the negative, one State reported that all pupils in need of transportation are provided with this service, and one reported that transportation is simply included as an item of expense in the State equalization plan.

Covert found that there were legal provisions in thirteen of the twenty States for which he provided tabular data which permitted adjustments to be made in the arrangements for financing

Findings--this study

recognizing the Criterion through administrative rules and regulations (including standards).

It was found that twenty-five of the States reporting apparently recognized Criterion Number 9, according to the State transportation directors, through statutes and/or the State aid formula, with a number of additional States apparently recognizing this Criterion through administrative rules and regulations (including standards).

In this survey, it was found that twenty-one of the States recognized Criterion Number 5, according

Covert's twenty States

pupil transportation service in case of consolidation, fires, or other changes taking place in the school district making such an adjustment desirable. Five of the twenty States had no such provision and two did not respond.

According to Covert's findings in 1946, the laws of the twenty States surveyed provided for the paying of the board and lodging of pupils under certain conditions in lieu of transportation. Seven of the twenty States reported no such provision. One State did not respond.

In Covert's 1946 study, eleven of the twenty States reported that their State plan for financing pupil

Findings--this study

to State directors, through statutes and/or the State aid formula, with an even larger number (29) indicating that this Criterion was also recognized through administrative rules and regulations (including standards).

It was found in the 1963 survey that twelve of the States recognized Criterion Number 10, according to the State directors, through statutes and/or the State aid formula, with nineteen State directors indicating that their State recognized this Criterion through its administrative rules and regulations (including standards).

Covert's twenty States

transportation promoted safety, efficiency, and economy of operation.

In answer to the question as to whether or not the State provision for financing pupil transportation stimulates desirable reorganization of local school administrative and attendance areas, Covert's 1946 study indicated that eleven States responded in the affirmative, seven in the negative. In the judgments of State officials, the State plans for financing pupil transportation helped in bringing improvement in school district organization in eleven of the twenty States

Findings--this study

In this survey, it was found that seventeen of the States recognized Criterion Number 12, according to the State directors, through statutes and/or the State aid formula. Twenty States also recognized the Criterion through their administrative rules and regulations (including standards).

Seventeen of the States recognized Criterion Number 7, according to State directors, through statutes and/or the State aid formula, with twenty-seven State directors reporting that this Criterion is also recognized through State administrative rules and regulations (including standards).

Covert's twenty States

responding but did not help in this respect in seven of the States.

Covert did not include this Criterion in his 1946 study.

Covert's 1946 study indicates that the adequate accounting of financial aspects of pupil transportation was required in thirteen of the twenty States included in his study but was not required in four of them. No information was received from three of the twenty States in regard to this particular question.

CHAPTER V

AN ANALYSIS OF STATE PLANS FOR FINANCING PUPIL TRANSPORTATION IN THE GREAT LAKES STATES

This chapter presents an analysis of State plans for financing pupil transportation in the five Great Lakes States of Michigan, Illinois, Indiana, Ohio, and Wisconsin in terms of: (1) the characteristics of State plans for financing pupil transportation, (2) the statutory basis of these plans, the relationship of the State transportation aid in these States to their over-all State aid programs, the State aid distribution plan (formula) for allocating pupil transportation aid in these five States, and finally in terms of (3) the twelve criteria for evaluating State plans for financing pupil transportation.

The five Great Lakes States were selected as the subjects for this study in order to: (1) ascertain whether State plans for financing pupil transportation could be profitably analyzed and appraised in terms of the above format, and if so, to (2) use a regional grouping of States such as this as a pattern for a national study to be developed on a regional basis.¹ Conducting a study of State plans for financing pupil

¹Appendix D.

transportation on a regional basis has certain advantages. Similar geographical, climatic, and socioeconomic conditions would normally be expected to indicate the presence of certain common problems and conditions in the organization, operation, administration, and financing of school transportation programs within these States.

The Characteristics of State Plans for
Financing Pupil Transportation
in the Great Lakes States

This section will set forth over-all characteristics of State plans for financing pupil transportation in the five Great Lakes States according to the same general pattern as developed in Chapter III of this study and will relate these characteristics to those of other State plans.

Qualifying for State Transportation Aid

The requirements for qualifying for State transportation aid in the five Great Lakes States reflect the same general pattern as was found in the majority of the fifty States. All five of the Great Lakes States prescribe the distance a child must reside from the school he attends in order to qualify for State transportation aid, Illinois, Indiana and Michigan require that both elementary and secondary pupils live one and one-half miles or over from the school they attend in order to be eligible for aid. Ohio requires that elementary and secondary pupils reside one mile from the school they attend,

while Wisconsin has a two mile requirement for both elementary and secondary pupils.

Nationally, thirty-six of the forty-four States which now allocate State transportation aid prescribe some distance requirement relative to the eligibility of pupils to qualify for State aid support under their State plans for financing pupil transportation. The Great Lakes States follow the general pattern of a majority of the States in requiring the local administrative unit to meet certain requirements with respect to the purchasing and maintenance of equipment, selection of drivers, and operating procedures.

Transportation Aid and the Foundation Program

Michigan, Indiana, Ohio, and Wisconsin² include State transportation aid in the State foundation program, with Illinois representing the single exception.

The Great Lakes States reflect the national trend in this respect in that the forty-four States which now expressly allocate State aid transportation are almost equally divided as to whether or not their State allowance is allocated separately from or included as a part of the State foundation program.

²Although transportation aid is not included in the State foundation programs, the cost of transportation in excess of the flat grant allocation is included in computing the State equalization aid received by some districts and therefore could conceivably be considered as a part of the foundation program under these circumstances. Table 18, p. 129.

Method of Distributing State
Transportation Aid

All five of the Great Lakes States employ a State aid formula in distributing State transportation aid. The distribution in Michigan and Ohio and, in part, of Indiana and Wisconsin is based on approved actual or average expenditures in the operation of the local program. Illinois' distribution is based on a flat percentage of the cost of local programs and Wisconsin employs a flat grant State aid allocation. Again the Great Lakes States generally reflect the current practice across the Nation. As a matter of fact, a majority of the States, twenty-seven of the forty-four, that provide State transportation aid calculate their State aid allowance according to a prescribed State aid formula.

Factors in the Formula

All five of the Great Lakes States recognize, either directly or indirectly, the number of pupils transported as a factor in the State aid formula for allocating State transportation aid, although Michigan does not use this factor in a direct manner but rather in a number of indirect ways such as in determining capital outlay allowance and the density factor. The Michigan State aid plan limits the per capita State aid allowance for transportation to actual cost or \$60 per pupil, whichever is less.

All five of the Great Lakes States recognize,

either directly or indirectly, a distance factor in their formula. This may be expressed in number of bus miles or distance transported. Indiana and Michigan make use of the distance factor in obtaining a density factor, and Wisconsin uses this factor in computing the State's schedule of annual per pupil allowances.

A density factor is recognized in the formula in three of the five Great Lakes States--Illinois, Indiana and Michigan. Approximately one-fourth of the forty-four States allocating State transportation aid recognize density as a factor in the State aid formula for pupil transportation.

Road conditions as a factor in the formula are recognized by only one of the Great Lakes States, namely Ohio. Six of the forty-four States allocating State transportation aid recognize this factor in the State aid formula for pupil transportation.

Bus depreciation is a factor in the formula or in the over-all State aid plans of all five of the Great Lakes States. Michigan indirectly recognizes the factor in its formula through the capital outlay allowance, which is based on \$14 per seat allowance for any prescribed period. Ohio recognizes this factor by means of a separate appropriation: "School districts receiving State aid funds under the foundation program and otherwise approved and eligible according to certain criteria are eligible to receive State aid funds for the purpose of

purchasing transportation equipment" in Ohio.

Approximately one-half of the forty-four States allocating State transportation aid recognize bus depreciation as a factor in the formula or over-all State aid plan.

Factors considered in the formulas of the five Great Lakes States are summarized in Table 19.

Statutory Basis for Transporting Pupils
in the Great Lakes States

This section consists of a summary of the status of the five Great Lakes States with respect to the statutory basis for providing pupil transportation services. In order to better understand the statutory basis for transporting pupils in the Great Lakes States it might be well to briefly review the development of the statutory authority for providing the services in the various States.

Little or no uniformity is to be found among the States of the Nation in regard to legal authorization for pupil transportation.³ Although most of the States first passed a law permitting the use of public funds for transportation, even today general transportation is not mandatory in approximately one-fourth of the States under any circumstances. Many States, on the other hand,

³E. Glenn Featherston and John B. Murray, State Provisions for Transporting Pupils, Office of Education, United States Department of Health, Education, and Welfare, OE-20015 (Washington: Government Printing Office, 1960).

TABLE 18.--Characteristics of the State plans for financing pupil transportation in the five Great Lakes States (requirements--methods of distribution), 1963

State	Requirements to qualify for State funds for transportation		Part of foundation program		Basis for allocating State funds				
	Distance--miles		Other requirements	Yes	No	Flat grant	Flat % of cost ^{1/}	Approved actual or average expenditure	Formula ^{2/}
	Elementary	Secondary							
1	2	3	4	5	6	7	8	9	10
Illinois	1-1/2	1-1/2	Must meet standards for buses, drivers, and operating procedures.	-	X	-	X	-	X
Indiana	over 1-1/2	over 1-1/2	1957 legislature froze per pupil distribution to average for 1955-56 and 1956-57 school year.	X	-	-	-	-	X
Michigan	1-1/2	1-1/2	Transportation must be on approved routes. Per capita State aid allowance limited to actual cost not to exceed \$60. Pupils must live outside village or city limits.	X	-	-	-	X	X
Ohio	1	1	Must be in approved vehicles.	X	-	-	-	^{2/}	X
Wisconsin	2	2	Must be on approved routes and in approved vehicles.	^{1/}	-	X	-	X	X

^{1/}Sometimes with a top limit or ceiling.

^{2/}Sometimes used only to calculate ceiling on cost or payments.

^{3/}If less than formula.

^{4/}Although transportation aid is not included in the State foundation programs, the cost of transportation in excess of the flat grant allocation is included in computing the State equalization aid received by some districts and therefore could conceivably be considered as a part of the foundation program under these circumstances.

Source: John B. Murray, "Characteristics of State Plans for Financing Pupil Transportation," Office of Education, United States Department of Health, Education, and Welfare (Washington: Office of Education, 1963).

TABLE 19.--Characteristics of the State plans for financing pupil transportation in the five Great Lakes States (factors in formula), 1963

State	Factors in State formula for determining transportation needs of local school units						
	Number of pupils	Number of buses	Number of bus miles	Density of transported population	Road conditions	Bus depreciation	Other
1	2	3	4	5	6	7	8
Illinois	A.D.A.	-	X	X	-	X	Approved transportation programs are reimbursed by the State on the basis of either 50% of the cost of such transportation according to a State cost formula or at the rate of \$16-32 per transported pupil as determined by a State density formula whichever is less.
Indiana	X	-	$\frac{1}{2}$	X	-	X	Pupils per bus mile. Bus depreciation is computed as a part of total operation cost. Formula also includes a wealth factor which is designed to provide more support for less wealthy school districts.
Michigan	$\frac{2}{3}$	-	$\frac{3}{4}$	$\frac{3}{4}$	-	$\frac{4}{5}$	-
Ohio	Enr.	-	X	-	X	$\frac{5}{6}$	-
Wisconsin	A.D.M.	-	$\frac{6}{7}$	-	-	X	The amount of the State aid allowance allocated under the flat grant depends on number of miles pupil is transported. Equalization aid if net cost exceeds 2 mills.

1/Used in calculating the sparsity factor.

2/Factor used in calculating both the capital outlay and operation allowances.

3/Factor used in calculating the per mile allowance and the overall operational allowance.

4/Calculated on the basis of an annual per seat allowance.

5/Separate State appropriation allocated on the basis of a State price schedule for equipment and district's valuation per child.

6/Factor used in calculating per pupil allowance.

Source: John B. Murray, "Characteristics of State Plans for Financing Pupil Transportation," Office of Education, United States Department of Health, Education, and Welfare (Washington: Office of Education, 1963).

TABLE 12.—*Unemployment of the State Plans for Unemployment in the State Plans*
(Unemployment in the State Plans)

State	Unemployment in the State Plans for Unemployment in the State Plans						
	Unemployment in the State Plans for Unemployment in the State Plans	Unemployment in the State Plans for Unemployment in the State Plans	Unemployment in the State Plans for Unemployment in the State Plans	Unemployment in the State Plans for Unemployment in the State Plans	Unemployment in the State Plans for Unemployment in the State Plans	Unemployment in the State Plans for Unemployment in the State Plans	Unemployment in the State Plans for Unemployment in the State Plans
Alabama	1.1.1.	-	1	1	-	1	1
Arkansas	1	-	1	1	-	1	1
California	1.1.1.	-	1	1	-	1	1
Colorado	1.1.1.	-	1	1	-	1	1
Connecticut	1.1.1.	-	1	1	-	1	1
Delaware	1.1.1.	-	1	1	-	1	1
District of Columbia	1.1.1.	-	1	1	-	1	1
Florida	1.1.1.	-	1	1	-	1	1
Georgia	1.1.1.	-	1	1	-	1	1
Idaho	1.1.1.	-	1	1	-	1	1
Illinois	1.1.1.	-	1	1	-	1	1
Indiana	1.1.1.	-	1	1	-	1	1
Iowa	1.1.1.	-	1	1	-	1	1
Kansas	1.1.1.	-	1	1	-	1	1
Kentucky	1.1.1.	-	1	1	-	1	1
Louisiana	1.1.1.	-	1	1	-	1	1
Maine	1.1.1.	-	1	1	-	1	1
Maryland	1.1.1.	-	1	1	-	1	1
Massachusetts	1.1.1.	-	1	1	-	1	1
Michigan	1.1.1.	-	1	1	-	1	1
Minnesota	1.1.1.	-	1	1	-	1	1
Mississippi	1.1.1.	-	1	1	-	1	1
Missouri	1.1.1.	-	1	1	-	1	1
Montana	1.1.1.	-	1	1	-	1	1
Nebraska	1.1.1.	-	1	1	-	1	1
Nevada	1.1.1.	-	1	1	-	1	1
New Hampshire	1.1.1.	-	1	1	-	1	1
New Jersey	1.1.1.	-	1	1	-	1	1
New Mexico	1.1.1.	-	1	1	-	1	1
New York	1.1.1.	-	1	1	-	1	1
North Carolina	1.1.1.	-	1	1	-	1	1
North Dakota	1.1.1.	-	1	1	-	1	1
Ohio	1.1.1.	-	1	1	-	1	1
Oklahoma	1.1.1.	-	1	1	-	1	1
Oregon	1.1.1.	-	1	1	-	1	1
Pennsylvania	1.1.1.	-	1	1	-	1	1
Rhode Island	1.1.1.	-	1	1	-	1	1
South Carolina	1.1.1.	-	1	1	-	1	1
South Dakota	1.1.1.	-	1	1	-	1	1
Tennessee	1.1.1.	-	1	1	-	1	1
Texas	1.1.1.	-	1	1	-	1	1
Vermont	1.1.1.	-	1	1	-	1	1
Virginia	1.1.1.	-	1	1	-	1	1
Washington	1.1.1.	-	1	1	-	1	1
West Virginia	1.1.1.	-	1	1	-	1	1
Wisconsin	1.1.1.	-	1	1	-	1	1
Wyoming	1.1.1.	-	1	1	-	1	1

1. Used in calculating the weekly benefit.

2. Used in calculating the weekly benefit.

3. Used in calculating the weekly benefit.

4. Used in calculating the weekly benefit.

5. Used in calculating the weekly benefit.

6. Used in calculating the weekly benefit.

7. Used in calculating the weekly benefit.

Source: U. S. Bureau of Economic Warfare, "Unemployment in the State Plans for Unemployment in the State Plans" (Washington, D. C., 1941).

decided that transportation was the logical means of bringing an education more easily within the reach of many children and enacted legislation to require it under certain circumstances. A large number of States, for example, now require the transportation of all children living beyond a specified distance from school. There is a great deal of variation, however, in the conditions under which transportation is required and, to a lesser degree, under which it is permitted in the various States.

States began, in relatively recent years, to make provision for the transportation of special groups, sometimes under criteria different from those for general transportation. By far the most common of the special groups for which transportation is provided is that of handicapped children. However, there are still several States which have made no special provision for transportation of this group. Other groups for which States less frequently make transportation available are pupils attending private schools, teachers, and other employed personnel.

In recent years, and particularly since schools have purchased their own buses, it has become common practice to transport pupils to points away from the school building for instructional purposes and to extra-curricular activities. Almost one-half of the States have authorized such transportation by law. However, even in the remaining States it is fairly common practice,

and in most States public funds can be used for such a purpose. Again there is much variation in the provisions of the various States.

As was previously indicated, the following data pertaining to the statutory basis for providing transportation in the Great Lakes States were obtained from a U.S. Office of Education circular.⁴

Michigan

Permissive provisions.--Any district may provide transportation to another district when children live nearer to bus lines established within another district--or they may enter into contract to furnish transportation for nonresidents.

A fourth class school district may pay transportation of resident pupils to another district even though grades in which such pupils may be enrolled are maintained within the district.

Mandatory provisions.--Any district which does not maintain grades above the eighth shall provide transportation for resident pupils who have completed the eighth grade to high school of another district or districts.
(May send to schools in border States.)

A primary school district which discontinues school or certain grades shall pay transportation of resident children in such school or grades to another

⁴Ibid.

school or schools.

Third class district has power and duty to provide adequate facilities for transportation within the district of pupils from and to their homes when the board deems it advisable.

Physically handicapped.--Any district may provide transportation for any resident physically handicapped pupil who otherwise would be unable to attend school within the district or in other districts. State schools for the deaf and the blind may furnish transportation for children of indigent parents.

Mentally handicapped.--May furnish transportation outside district to approved programs.

Other special groups.--The board of education of any school district which furnishes transportation for its resident pupils attending public schools within such district or in other districts may provide or pay transportation for its resident pupils who attend private or parochial schools located within the district or in other districts. (Shall be transported along regular routes of public school buses.)

Transporting for curricular or extracurricular purposes.--The board of education of any school district may furnish transportation for its resident or nonresident pupils attending school in the district to educational programs at county or community fairs, to health clinics in or outside the district, and to educational functions

in any other school district or community.

General practices, not mentioned in law.--Student spectators to athletic contests.

Method of financing.--May use district or activity funds.

Illinois

Permissive provisions.--The board of directors of a district having a population of fewer than 1,000 may provide free transportation for pupils, and where in its judgment the interests of the district and of the pupils therein will best be subserved by so doing the board of directors may permit the pupils in the district or in any particular grade to attend the schools of other districts and may provide free transportation for such pupils.

Nonhigh school districts may furnish transportation for the pupils of the district not living within 1-1/2 miles of a high school, provided that the board of education finds that the district has sufficient moneys available after the payment of other district expenses, including tuition.

Mandatory provisions.--School boards of community consolidated districts, community unit districts, consolidated districts and consolidated high school districts shall provide free transportation for pupils residing at a distance of at least 1-1/2 miles from any school maintained within the district.

Physically handicapped.--State provides special funds for the education, including transportation, of the handicapped.

Mentally handicapped.--Same as for physically handicapped.

Other special groups.--If children who attend any school other than a public school reside on or along the highway constituting regular route of public school bus or conveyance provided by any school district for transporting pupils to and from the public schools, the school board of such district shall afford transportation, without cost, for such children, from their homes or from some point on the regular route nearest or most easily accessible to their homes, to such school, or to the point on such regular route which is nearest or most easily accessible to such school. (Attorney general--if it can be done at no extra expense.)

General practices, not mentioned in law.--Vehicles are used for school-sponsored activities.

Method of financing.--May use public funds--may also use activity funds.

Indiana

Permissive provisions.--Township school trustees, boards of school trustees, and boards of school commissioners may provide means of transportation for any pupils in any school district or school corporation, if

the conditions in the school district or school corporation, in the judgment of the township trustees, board of school trustees or board of school commissioners warrant the same. School trustees are empowered at their discretion to transport high school pupils.

Mandatory provisions.--In all school corporations . . . where a school has been abandoned, or may be abandoned, the school trustees shall provide and maintain means of transportation for all pupils of such abandoned school who live a greater distance than 1-1/2 miles from the school to which they are assigned. When any township does not maintain and operate a high school and when fifteen or more high school pupils who reside in such township are transferred for school purposes to another school corporation, the trustee of any such township, upon petition of a majority of the parents or guardians of such pupils, shall provide transportation for such pupils from a convenient central place or central places in such township, to be designated by the trustees, to the high school or high schools in such other corporation or corporations to which such pupils are to be transferred.

Physically handicapped.--School cities, towns, and townships may provide transportation for children who are enrolled in special classes . . . , in cases where such children are physically unable to reach the school where they are entitled to attend or where such school is located at a greater distance from the home of such child

or children than the regular school.

Other special groups.--Where school children who are attending parochial school in any school corporation of this State reside on or along the highway constituting the regular route of a public school bus or conveyance, the school trustee shall afford transportation, without extra charge, by means of such school bus or conveyance, for the children attending any such parochial school, from their homes, or from some point on the regular route nearest or most easily accessible to their home, to such parochial school, or to the point on such regular route which is nearest or most easily accessible to such parochial school.

Transporting for curricular or extracurricular purposes.--The school bus may be used for group movements to and from athletic games, contests, or other school functions under the direct auspices of the public schools or for such other purposes as may be approved by the State school bus committee.

Method of financing.--Local funds may be used--also activity funds.

Ohio

Permissive provisions.--All city, exempted village and local school districts may provide transportation for resident high school pupils to the high school to which they are assigned.

Any city, exempted village or local school district may contract with the board of another district for the admission or transportation or both, of pupils into any school in such other district. EXCEPTION: No board of education shall provide transportation for nonresidents except by written consent of district of residence.

Mandatory provisions.--All city, exempted village and local school districts where resident elementary school pupils live more than two miles from the school to which they are assigned shall provide transportation for such pupils to and from school. If the local board of education and the county board of education agree that such transportation is impracticable or that no offer for such transportation is practicable the board may pay the parent or other person in charge of the child or children for the transportation of such child or children at a rate determined by the local board of education.

Physically handicapped.--City, exempted village and local school districts shall provide transportation for all children who are so crippled that they are unable to walk to the school to which they are assigned.

Transporting for curricular or extracurricular purposes.--Authorized by State director and provided in accordance with regulations recommended by the Ohio Advisory Committee on Transportation.

Method of financing.--May use district funds.

Cannot charge fees to students but may use activity funds.

Wisconsin

Permissive provisions.--Districts operating public high schools may provide transportation for nonresident high school pupils living more than two miles from the school house within areas served from the school by bus routes approved by the county school committee and the State superintendent.

Any school district operating a public elementary school or a public high school of any type may authorize the transportation of all or any part of the students of such school district, including nonresident high school students, provided that if such transportation is furnished to less than all the students there shall be reasonable uniformity in the minimum distance that pupils will be transported.

Mandatory provisions.--All districts operating public elementary schools or public high schools of any type shall provide transportation to and from school for all pupils residing in the district and over two miles from the nearest public school they attend.

Physically handicapped.--Every district shall provide transportation for physically disabled children to any elementary or secondary schools regardless of distance.

Mentally handicapped.--School districts in which

a child resides shall provide (if not provided otherwise) for transportation of handicapped (defined to include mentally handicapped).

Other special groups.--All school districts may provide transportation for teachers to and from school subject to the same controls and limitations as for the transportation of public school children.

Transporting for curricular or extracurricular purposes.--Any school district may provide transportation for pupils, parents, teachers, school doctors, dentists, and nurses to any extracurricular school activity such as a school athletic contest, school game, school field or any other similar school trip under supervision of competent adult employee when bus is driven by a regular driver, when the bus is insured, when approved by the principal or person with comparable authority, and when trip is in State or within fifty miles of its borders.

Method of financing.--Any school district may make a charge for such transportation to be paid by the persons transported or the district may pay the total cost.

The Relationship of Transportation Aid
to State Aid Programs in the
Great Lakes States

As was pointed out in Chapter III, a State aid allocation for pupil transportation may be distributed in a number of ways. One method employed is to make the

State aid payment to the local school district in support of the transportation program without regard for any other State moneys paid to that district. Another method commonly used in a number of States is to include in the State foundation program an amount for transportation as may be determined by some method of measuring the local need and/or cost for this service. At least two approaches are available in this regard, (1) the so-called "lump sum plan,"⁵ whereby the State aid allocation is computed on the basis of an allowance per pupil or per classroom unit, or (2) the "item plan,"⁶ in which the State aid allocation is computed for a number of separate and specific budget items with perhaps separate allowances provided for each budget item. When these methods of computing State assistance are used, the State may or may not indicate in the State aid allowance that a certain amount of the State funds allocated was for transportation or for any other specific item in the foundation program.

A summary of the status of the Great Lakes States with respect to the relationship between State transportation aid and the over-all State aid program follows:

Michigan.--The Michigan State aid program includes,

⁵Albert R. Munse and Eugene P. McLoone, Public School Finance Programs of the United States, 1957-58, Office of Education, United States Department of Health, Education, and Welfare, Misc. No. 33 (Washington: Government Printing Office, 1960), p. 3.

⁶Ibid.

along with certain special-purpose flat grants for which a district may be eligible, (1) a general-purpose flat grant to school districts based on an annual census of children residing in the district, and (2) a general-purpose equalizing State aid grant.

In order to participate in the distribution of the general-purpose equalizing State aid grant, a school district must levy at least 5 mills (7 mills required for full participation) on the State equalized value of the district. Districts must use money from this grant only for such expenditures as salaries, tuition, transportation, utilities, textbooks, and other supplies. Each eligible district receives, in the form of a general-purpose equalizing State aid grant, the difference between a gross allowance based on school membership and moneys available from the general-purpose flat grant based on annual census, plus the yield of 2.75 mills tax levy on the State equalized value of the district.

In determining the total State aid allowance, an amount is included for the transportation of pupils who live more than 1.5 miles from the school they attend, provided they are transported over routes approved by the superintendent of public instruction.

The Michigan State Aid Act limits the per capita State aid allowance for transportation to actual cost or \$60 (whichever is less); for the physically handicapped actual cost up to \$60; for the mentally handicapped, \$200.

If the State's appropriation for transportation is not sufficient to pay out under the formula, deductions are made on a percentage basis in an amount sufficient to bring the allowance in line with the appropriation.

Illinois.--The Illinois State aid program for education includes, along with a number of special-purpose flat State aid grants for such programs as pupil transportation and special education, certain general-purpose flat and equalizing State aid grants. The general-purpose flat grant provisions of the Illinois Common School Fund provide, in addition to State aid for districts operating junior colleges, for general-purpose flat grants to school districts on the basis of ADA. The general-purpose equalizing State aid provisions of the Common School Fund require school districts operating only elementary or high school grades to levy 5 mills on the assessed valuation of the district, while districts operating all twelve grades are required to levy 6.2 mills with the yield from the required local millage levy deducted from the gross allowance for which the district is eligible under the State support program.

Indiana.--The Indiana Minimum Foundation Program, which consists of (1) a general-purpose and (2) certain special-purpose equalizing State aid grants, is a three part program. A major portion of the State aid distributed through the Foundation Program is allocated in support of the cost of instruction and administration on the basis

of an objective formula which includes Average Daily Attendance converted to Teaching Units, and on an average recognized salary for teachers based on a schedule which recognizes training and experience and a local levy.

The State aid allowance for instructional salaries under the foundation program is equal to the Minimum Foundation Program (Total Units x Average Recognized Salary of Teachers) minus the Local Share. The Local Share is a computed sum based on a chargeable tax rate of 50 cents applied to local assessed wealth which in turn is adjusted by a tax adjustment factor. The tax adjustment factor is established for each county and is an equalization factor. Local Share increases in direct proportion to the assessed wealth of a school corporation (district) and as Local Share increases the amount of support decreases.

The State aid allowance for Other Current Expense (Equalization) is paid to approximately one-third of the school corporations (districts) which rank lowest in wealth or evaluation per pupil. This is additional support for all operating expense other than instruction and transportation. Local Share computations are adjusted so that corporations with approximating \$6,700 of assessed wealth or more per pupil do not qualify for these State Funds.

Ohio.--The State foundation program of education includes allowances for teachers' salaries, classroom

maintenance, retirement, transportation operating costs, and other approved current expenses. A participating school must levy 12.5 mills against the district's assessed valuation in order to receive State aid. The amount of State aid for which districts are eligible is established by a factor formula. The district is eligible to receive, in State aid, the amount by which the allocation under the foundation formula exceeds the sum of the required 12.5 mill levy.

Wisconsin.--The Wisconsin State aid program for education consists, in addition to the general-purpose and equalizing flat grant distributions from the Wisconsin Public School Fund, certain special-purpose equalizing and flat State aid grants. In order to participate in the flat grant portion of the Wisconsin Public School Fund, districts must maintain schools at least 180 days, maintain the State teachers' minimum salary schedule, and a 5 mill levy for K-12 districts qualifying for integrated aid and a 3 mill levy on the equalized valuation of all other districts. Wisconsin school districts are classified annually as "basic," those which meet the State minimum standards or "integrated," those which meet higher and additional State standards. The equalizing portion of the Public School Fund equalizes up to 15 mills on a \$24,500 guaranteed evaluation per resident elementary pupil in basic districts, up to 15 mills for elementary and secondary resident pupils on a \$33,000 guaranteed

evaluation per resident elementary and secondary pupil in integrated districts (for those integrated districts operating only K-8 programs this fund equalizes up to 15 mills on a \$28,000 guaranteed evaluation per elementary resident pupil in ADM). Union high schools, which may be approved as basic or integrated districts, are equalized up to 10 mills on \$55,000 evaluation per resident pupil for basic approval and \$70,000 per resident pupil for integrated approval. The Wisconsin State aid program also includes, in addition to a special-purpose equalizing State aid grant for pupil transportation, certain special flat grants for special education, vocational and adult education, and pupil transportation.

The Distribution Plans (Formulas) for
Allocating Transportation Aid
in the Great Lakes States

The State aid formulas incorporated into State plans for financing pupil transportation often appeared to be extremely complicated. It is natural to conclude that if these State plans, or more specifically, these State aid formulas, for transportation are to be more readily understood by individuals and groups interested in this particular area of school finance, a format of some type is needed to serve as a guide in organizing and setting forth formula details for pupil transportation in a clear, concise, and understandable manner. The format should serve at least two functions. It should enable

any interested party to obtain rather quickly a cursory understanding of the major involvements and computations in almost any given State aid formula for pupil transportation, and provide a means by which both the major similarities and differences in any two or more plans or formulas can be profitably compared and studied.

It was with these purposes in mind that in 1962 such a format was developed for use in this study. That format is used in this chapter in describing the plans for financing pupil transportation in the five Great Lakes States. The data used in developing these State reports⁷ was obtained from school laws of the several States, special State reports and publications, and State departments of education personnel, chiefly State supervisors and/or directors of transportation.

The original format was developed around the Maryland⁸ and later the Michigan State plan for financing pupil transportation. In subsequent reports for New York, Ohio, Wisconsin, Illinois, Indiana, Utah, and Colorado, the original format of the Maryland and Michigan reports was then used as an organizing guide.⁹ In this manner, development of the subsequent reports was greatly facilitated.

⁷Appendix A.

⁸Ibid.

⁹The New York, Utah and Colorado reports are not included in this study.

Formulas for Allocating State Transportation
Aid in the Great Lakes States

As a result of the limitations inherent in many of the earlier methods States employed to finance pupil transportation, such as per pupil flat grant allowances, matching State aid allowances, or allowances based on a percentage of the cost of the program, a number of States sought to develop State aid formulas for the more equitable distribution of State support. These State aid formulas were viewed as a means by which a State could determine, in a more equitable manner, local need and ability according to a prescribed and predetermined set of criteria.

The various State aid formulas are designed primarily to measure justifiable costs, and in several of the formulas the actual cost of the program at the local level represents a direct factor in computing the State aid allowance. State aid formulas vary as to number of factors to be taken into consideration in calculating the allowance for pupil transportation.¹⁰ Most of these formulas, however, take into consideration such factors as the number of pupils transported, the number of school buses utilized, the number of bus miles traveled, density, road conditions, and depreciation of equipment.¹¹ A detailed description of the formulas for allocating

¹⁰Table 12, p. 79.

¹¹Ibid.

State transportation aid in the five Great Lakes States follow:

Michigan.--The Michigan formula takes into consideration four basic allowances: capital outlay, operation, insurance, and bus driver education in allocating State transportation aid funds.

METHOD USED TO DETERMINE THE STATE TRANSPORTATION
AID ALLOCATION FOR SCHOOL DISTRICT-OPERATED
PUPIL TRANSPORTATION PROGRAMS

A. Capital Outlay Allowance

Example

To determine the capital		
outlay allowance the total		
number of children transported		
and eligible for State aid ^{1/} or	^{1/} 2923.5	
the total manufacturer's rated		
capacity of all school buses ^{2/}	^{2/} 1638	
(whichever is less) is multiplied	x	
by an allowance of \$14 ^{3/} which	^{3/} \$14	
equals the net allowance for		
capital outlay. ^{4/}	^{4/} =	<u>\$22,932</u>

B. Operation Allowance

To determine the allowance	
for operation, the total number	
of children transported eligible	
for State aid ^{5/} is divided by	^{5/} 2923.5
the total certified daily	÷
mileage of all buses ^{6/} to obtain	^{6/} 1321.5

B. Continued--

the density factor.^{7/} If the factor is:

less than 1 the allowance is

18¢ per mile

1 but less than 2 the allowance

is 20¢ per mile

2 but less than 3 the allowance

is 22¢ per mile

3 but less than 4 the allowance

is 24¢ per mile

4 or more the allowance is 26¢ per mile

The density factor allowance^{8/} is then multiplied by the total annual map mileage^{9/} which is in effect the total certified daily map mileage of all school buses times the number of days in session^{10/} to determine the gross allowance for operation.^{11/}

Example

^{7/} = 2+

^{8/} \$.22

x

^{9/} 1321.5

x

^{10/} 200

^{11/} \$58,146

The net State aid allowance for operation is then determined by subtracting from the total number of children transported^{12/} the total number of pupils eligible for State aid,^{13/} thus

^{12/} 3584

^{13/} 2923.5

B. Continued--

Example

deriving the number of pupils transported but not eligible for State aid.^{14/}

$$\underline{14/} = 660.5$$

The gross State aid allowance for operation^{15/} is then divided by the total number of all children transported^{16/} to determine the per capita operation cost.

$$\underline{15/} \$58,146$$

$$\div$$

$$\underline{16/} \quad 3,584$$

$$= \$16.22$$

The number of pupils transported not eligible for State aid^{17/} is then multiplied by \$8 or by 25% of the per capita operation cost (whichever is the larger amount) to determine the amount to be deducted from the gross operation allowance.^{18/}

$$\underline{17/} 660.5$$

$$\times$$

$$\$8 \text{ or } 25\% (\$4.05)$$

$$\underline{18/} = \$5,284$$

This sum deducted from the gross State aid allowance for operation^{19/} or the sum obtained by multiplying the total number of children transported eligible for State aid by the per capita operation cost^{20/} (whichever is the larger amount) represents the net State aid allowance

$$\begin{array}{r} \underline{19/} \$58,146 \\ - \quad 5,284 \\ \hline = \$52,862 \end{array}$$

$$\begin{array}{r} 2923.5 \\ \times \$16.22 \\ \hline \end{array}$$

$$\underline{20/} = \$47,419.17$$

B. Continued--

for operation. 21/

Example

21/ \$52,862

C. Insurance Allowance

Multiply the number of buses
used daily for transportation 22/
by \$42 or actual cost, including
P.L., P.D., and Comprehensive
Coverage only (whichever is
less), to determine the allow-
ance for insurance. 23/

22/ 28
x
\$42

= 23/ \$1,176

D. Allowance Bus Driver Education

To determine the allowance
for bus driver education,
multiply the number of drivers 24/
attending eight or more class
hours by \$12.50 or actual cost.

24/ 27
x
\$12.50
= \$337.50

add - mileage allowance @ \$.07
per mile

+ _____

add - meal allowance (actual
cost-allowance not
specified)

\$22.80

add - salary allowance (actual
cost-allowance not
specified)

\$378.75 (303 hrs.
x \$1.25)

Total bus driver education
allowance

\$739.05

To obtain the administrative
unit's total State aid allowance

D. Continued--

Example

for transportation, add the

Capital Outlay Allowance	\$22,932.00
Operation Allowance	52,862.00
Insurance Allowance	1,176.00
Allowance Bus Driver Education	739.05
Total State Aid	\$77,709.05

To determine per capita
allowance, divide the total

State aid allowance ^{25/} by the	^{25/} \$77,709.05
total number of children trans-	÷
ported eligible for State aid ^{26/}	^{26/} 2,923.5
to obtain the per capita	
allowance. ^{27/}	^{27/} = \$26.58

If the per capita allowance
is less than \$60, the State aid
allowance is as indicated above.

If the per capita allowance is
more than \$60, multiply total
number of children transported
eligible for State aid times
\$60 for State aid allowance.

METHOD USED TO DETERMINE THE STATE TRANSPORTATION
AID ALLOCATION FOR PRIVATELY OPERATED
PUPIL TRANSPORTATION PROGRAMS

Example

State aid allowances for

transportation services,
provided under private contracts
(including private automobiles)
or by common carrier, have the
same limitation as to maximum
State allowance--actual cost
not to exceed \$60--and are
determined in the same manner
as school district-operated
programs.

Illinois. Any school district which meets certain standards as established by the Superintendent of Public Instruction and otherwise operates an approved transportation program is reimbursed by the State for either 50 per cent of the cost of such transportation according to a State cost formula or at the rate of \$16 to \$32 per pupil transported, as determined by a State density formula, whichever is less.

METHOD USED TO DETERMINE THE STATE TRANSPORTATION
AID ALLOCATION FOR SCHOOL DISTRICT-OPERATED
PUPIL TRANSPORTATION PROGRAMS

Example

In order to determine a school district's State aid reimbursement for pupil transportation under the Illinois formula, (1) the total days of enrollment and (2) the total

Example

annual school bus mileage over "A," "B," and "C" Routes must first be computed in order to determine the district's State aid allowance.

The total days of pupil enrollment over: "A" Routes - bus routes transporting only pupils residing 1-1/2 miles or more from school attended^{1/} "B" Routes - bus routes transporting both pupils residing less than 1-1/2 miles or 1-1/2 miles or more from school attended.^{2/}

1/None

2/11,520

(1) To compute the total days of pupil enrollment over "B" Routes of 1-1/2 miles or more, the total number pupils transported^{3/} is multiplied by the total number of days of transportation during the year^{4/} to obtain the total days of transportation over "B" Routes of 1-1/2 miles or more.^{5/}

3/60

x

4/180

5/= 10,800

(2) To compute the total days of pupil enrollment over "B" Routes of less than 1-1/2 miles, the total number of pupils transported less than 1-1/2 miles^{6/} is multiplied by

6/4

Example

the total number of days of transportation during the year 7/ to

x
7/180

obtain the total pupil days of transportation over "B" Routes of less than 1-1/2 miles. 8/ "C"

8/720

Routes--bus routes transporting only pupils residing less than 1-1/2 miles from school attended. 9/

9/None

To compute the district's total pupil days of transportation over all routes add ("A" + "B¹" + "B²" + "C") 10/

10/11,520

In order to determine the district's State aid allowance, next compute the total annual school bus mileage over:

"A" Routes--bus routes transporting only pupils residing 1-1/2 miles or more from school 11/ "B" Routes--bus routes transporting both pupils residing less than 1-1/2 miles and 1-1/2 miles or more from school attended. 12/

11/None

12/9,720

(1) Compute the total annual school bus mileage over "B" routes of 1-1/2 miles or more by multiplying

Example

the daily round trip mileage^{13/}
by the total days of pupil enroll-
ment^{14/} to obtain the total annual
school bus mileage over 1-1/2 mile
"B" Routes.^{15/}

$$\begin{array}{r} 13/50 \\ \times \\ 14/180 \\ \hline 15/ = 9,000 \end{array}$$

(2) Compute the total annual
school bus mileage over less than
1-1/2 mile "B" Route by multiplying
the daily round trip mileage^{16/} by
the total days of pupil enrollment^{17/}
to obtain the total annual school
bus mileage over less than 1-1/2
miles "B" Route.^{18/} "C" Routes--
bus routes transporting only pupils
residing less than 1-1/2 miles from
school attended.^{19/}
Extra-Curr. Mileage^{20/}

$$\begin{array}{r} 16/4 \\ 17/180 \\ \hline 18/ = 720 \\ \\ 19/ \text{None} \\ 20/300 \end{array}$$

To compute the district's
total gross annual school bus mileage
over all routes, add the total of
all "A," "B¹," "B²," "C" Routes and
extra-curr. mileage^{21/} to obtain
the total gross annual school bus
mileage.^{22/}

$$\begin{array}{r} 21/10,020 \\ \\ 22/10,020 \end{array}$$

To compute the district's
net allowable school bus mileage

Example

deducted from the total gross annual school bus mileage,^{23/} the total of all mileage over (1) "B" Routes of less than 1-1/2 miles and (2) "C" Routes^{24/} to obtain the total net allowable school bus mileage.^{25/}

$$\underline{23}/10,020$$

$$\underline{24}/720$$

$$\underline{25}/9,300$$

To determine the district's total annual student mileage over "B" Routes multiply the total annual pupil days of transportation over "B" Routes^{26/} by the total annual mileage over "B" Routes of 1-1/2 miles or more^{27/} and divide the product^{28/} by the total number of days the district is eligible for transportation during the school year^{29/} to obtain the total student miles of "B" Routes.^{30/}

$$\underline{26}/11,520$$

x

$$\underline{27}/9,000$$

$$\underline{28}/=103,680,000$$

÷

$$\underline{29}/180$$

$$\underline{30}/=576,000$$

To determine the total student miles of "B" Routes of less than 1-1/2 miles, multiply the total annual days of pupil enrollment over less than 1-1/2 mile "B" Route^{31/} by the weighed factor of 6^{32/} to obtain the total student miles of less than 1-1/2

$$\underline{31}/720$$

$$\underline{32}/^x_6$$

Example

miles of "B" Routes.33/

33/4,320

To secure the total gross annual allowable student miles of "B" Routes over 1-1/2 miles by subtracting from the total student miles of "B" Routes34/ the total annual student miles of less than 1-1/2 miles of "B" Routes35/ to obtain the total annual allowance mileage over all "B" Routes of 1-1/2 miles or more.36/

34/576,000

-

35/4,320

36/571,680

To secure the percentage of the total gross allowable "B" Route student mileage divide the total gross annual allowable student mileage over "B" Routes37/ by the total annual student mileage over all "B" Routes38/ to obtain the percentage of total annual allowable student miles over "B" Routes.39/

37/571,680

÷

38/576,000

39/ = 99%

To secure the total net annual allowable mileage over "B" Routes, multiply the total annual allowable "B" Route mileage40/ by the percentage of allowable student

40/9,000

x

Example

miles over "B" Routes 41/ to obtain
the total net annual allowable "B"
Routes mileage. 42/

41/ 99%

42/ = 8,910

To secure the total annual
allowable school bus mileage add
all "A" Routes mileage 43/ plus
the net annual allowance "B"
Route mileage 44/ to obtain the
total annual allowable school
bus mileage. 45/

43/ None

44/ 8,910

45/ = 8,910

State aid reimbursement
under the State cost formula is
based on the districts actual,
allowable, annual transportation
costs.

SCHEDULE OF DISTRICT'S ACTUAL ANNUAL
TRANSPORTATION COSTS

Costs

Salaries 46/

46/ \$1,000

Includes all salaries of
transportation supervisors, drivers,
mechanics and garage employees,
clerks and other transportation
employees. Contracted services
and/or fares paid Pub. Carriers 47/

+

47/ None

Includes expenditures to

Example

owners who operate school buses and small vehicles to transport pupils; to contractors who own a part of a bus, such as chassis (even though the school district owns the body); and to parents for transporting groups of children, including their own children or transporting only their own children.

+

Insurance^{48/}

48/50

Includes expenditures for public liability, property damage, medical care, collision, fires, and theft insurance. This includes expenditures for insurance on garages as well as transportation equipment.

+

Operation and Maintenance^{49/}

49/400

Includes expenditures for supplies and other expenses for the operation and maintenance of district-owned pupil transportation vehicles and district-operated pupil transportation garages.

+

Overcharges returned^{50/}

50/None

Depreciation - 15 percent of

Examplenet cost^{51/}^{51/}825

The net cost means the dollar amount expended to purchase the equipment reduced by any trade-in.

Other costs^{52/}^{52/}NoneTOTAL COSTS^{53/}^{53/}= \$2,275Deductions

Contracted services transporting for other Districts^{54/}

^{54/}None

Special Costs incurred for exceptional children^{55/}

^{55/}NoneOvercharges returned^{56/}^{56/}NoneOther expense reducing receipts^{57/}^{57/}NoneTOTAL DEDUCTIONS^{58/}^{58/}= None

To determine the district's net transportation costs, deduct from the district's total transportation costs^{59/} the total deductions^{60/} to obtain the district's total net pupil transportation costs.^{61/}

^{59/}\$2,275^{60/}None^{61/}\$2,275

To determine the district's pupil cost per mile, divide the district's total annual net transportation costs^{62/} by the total

^{62/}\$2,275

Example

annual allowable mileage of all vehicles (include extra-curr. mileage)^{63/} to obtain the district's transportation per mile cost.^{64/}

$$\div$$

$$\frac{63}{9,300}$$

$$\frac{64}{=} \$.244$$

To compute the district's cost of transporting eligible pupils under the State formula, multiply the total net annual allowable school bus mileage^{65/} by district's per mile cost for transportation^{66/} to obtain the gross cost to transport eligible pupils under the formula.^{67/}

$$\frac{65}{8,910}$$

$$\times$$

$$\frac{66}{\$.244}$$

$$\frac{67}{=} \$2,174.04$$

The gross cost to transport eligible pupils^{68/} multiplied by 50 percent^{69/} represents the State aid reimbursement for pupil transportation under the State cost formula.^{70/} This amount or the amount reimbursable under the State sparsity formula, whichever is less, represents the amount of State aid the district is eligible to receive under the State aid formula.

$$\frac{68}{\$2,174.04}$$

$$\frac{69}{50\%} \times$$

$$\frac{70}{=} \$1,087.02$$

To compute the amount of

Example

reimbursement under the State
 sparsity formula, the area of
 the district in square miles 71/
 is divided by the total number
 of pupils transported 1-1/2 miles
 or more. 72/ To obtain the square
 miles per pupil transported 73/
 the district's sparsity factor is
 then used to determine rate per
 pupil transported 74/ according to
 the following schedule:

$$\frac{71}{36}$$

$$\div$$

$$\frac{72}{60}$$

$$\frac{73}{60} = .6$$

Sparsity factor--if amount on
 line 19 is:

- (a) Less than .10, use \$16
- (b) .10 or more but less than
 .20, use \$20
- (c) .20 or more but less than
 .30, use \$24
- (d) .30 or more but less than
 .50, use \$28
- (e) .50 or more, use \$32

The total number of pupils
 transported 1-1/2 miles or more 75/
 is then multiplied by the appro-
 priate rate per pupil transported 76/
 to obtain the amount of reimbursement

$$\frac{74}{\$32}$$

$$\frac{75}{60}$$

$$\times$$

$$\frac{76}{\$32}$$

Example

the district is eligible to receive
under State sparsity formula. 77/

$$\underline{77} = \$1,920$$

The amount or the amount
under the State cost formula, 78/
whichever is less, represents the
amount of State aid the district
is eligible to receive under the
State aid formula.

$$\underline{78} / \$1,087.02$$

State aid allowances for
transportation services provided
under private contracts (including
private automobiles) or by common
carrier are determined in the same
manner as school district-operated
programs.

Indiana.--School districts (corporations) eligible
for State aid under the general provisions of the State
foundation program are also eligible to participate in
the pupil transportation State aid portion of the State
foundation program.

State aid allowance for School Transportation is
allocated on the basis of a formula which involves, in
addition to a wealth factor and a pupil sparsity factor,
actual operating costs and the length of the school term.
These factors are applied to a base rate of \$20 per
student. Students must live over 1.5 miles from the

school they attend in order to be counted in the Transportation Program.

METHOD USED TO DETERMINE THE STATE TRANSPORTATION
AID ALLOCATION FOR SCHOOL DISTRICT-OPERATED
PUPIL TRANSPORTATION PROGRAMS

Example

In order to determine a school district's State aid allowance, for pupil transportation under the Indiana formula, two factors must first be secured: (1) pupil sparsity, and (2) the district's per pupil valuation.

Pupil Sparsity Factor

To determine the district's pupil sparsity factor: the total number of resident public school pupils transported--who live more than 1-1/2 miles from the school building^{1/} is divided by the total round trip mileage of all bus routes^{2/} to obtain the number of pupils transported per mile ratio^{3/} using this ratio the following table is then used to obtain the district's pupil sparsity factor.^{4/}

$$\begin{array}{r}
 1/60 \\
 \div \\
 2/40 \\
 = \\
 3/1.5 \\
 = \\
 4/1.4
 \end{array}$$

ExampleSparsity Factor

<u>Ratio of Pupils</u> <u>Per Mile</u>	<u>Factor</u>
4.00 and over	.3
3.75 to 3.99	.4
3.50 to 3.74	.5
3.25 to 3.49	.6
3.00 to 3.24	.7
2.75 to 2.99	.8
2.50 to 2.74	.9
2.25 to 2.49	1.0
2.00 to 2.24	1.1
1.75 to 1.99	1.2
1.50 to 1.74	1.4
1.25 to 1.49	1.6
1.00 to 1.24	1.8
.75 to .99	2.0
.50 to .74	2.2
.49 and under	2.4

Computing the Per Capita Wealth

To determine the district's valuation per pupil the district's adjusted assessed valuation^{5/*} is divided by the district's total resident ADA^{6/} to obtain the district's valuation per pupil ratio^{7/} using this ratio the following table is thus used to obtain the district's wealth factor.^{8/}

$$\frac{5}{\$2,500,000.00}$$

$$\div$$

$$\frac{6}{500}$$

$$=$$

$$\frac{7}{\$5,000.00}$$

$$\frac{8}{1.5}$$

*Following page.

Example

Schedule of Per Capita Wealth Factors

*Adjusted Assessed
Valuation Per ADAFactor

\$16000 and over	.0
15000 to 15999	.2
14000 to 14999	.4
13000 to 13999	.6
12000 to 12999	.8
11000 to 11999	.9
10000 to 10999	1.0
9000 to 9999	1.1
8000 to 8999	1.2
7000 to 7999	1.3
6000 to 6999	1.4
5000 to 5999	1.5
4000 to 4999	1.6
3000 to 3999	1.8
2000 to 2999	2.0
below 2000	2.2

Adjusted Base Transportation Rate

The base transportation rate is then adjusted according to the length of the district's sparsity factor^{9/} is multiplied by the district's wealth factor.^{10/} The product^{11/} is in turn multiplied by the appropriate base rate according to the length of the district's school year,^{12/} as indicated on the following table,

$$\begin{array}{r}
 9/1.4 \\
 \times \\
 10/1.5 \\
 \hline
 11/2.10 \\
 \times \\
 12/20.00^{**} \\
 \hline
 =
 \end{array}$$

*The adjusted assessed valuation is found by multiplying the actual assessed valuation by the county tax adjustment factor. This factor was established in 1959 by the State Board of Tax Commissioners.

**Deduction per pupil due to insufficient appropriation.

Example

to obtain the district's adjusted
base rate. 13/ A further deduction
\$5*14/ is made to obtain the net
adjusted per pupil rate. 15/

13/ \$42.00

14/ \$ 5.00

15/ \$37.00

Adjusted Per Pupil TransportationRates

(1) (2) (3) (4) (5) (6) (7)

1.4 x 1.5 x \$20.00 9 mos.** = \$42 - \$5 = \$37

___ x ___ x \$18.89 8-1/2 mos. = ___ - ___ = ___

___ x ___ x \$17.78 8 mos. = ___ - ___ = ___

The total number of eligible

pupils transported 16/ is then mul-

16/ 60

tiplied by adjusted rate per pupil 17/

17/ \$37.00

to obtain the total maximum

=

allowance. 18/

18/ \$2,220.00

The total actual cost of
pupil transportation for the school
year is then itemized by the partic-
ipating school district in the
following manner:

The cost of transportation shall
include

Bus Driver Contractual Cost 19/

19/ \$1,000.00

(1) Sparsity Factor; (2) Wealth Factor; (3) Bus
Rate; (4) Length of School Term; (5) Adjusted Rate;
(6) Alteration; (7) Altered Rate.

*Deduction per pupil due to insufficient appro-
priation.

**Applies in this illustration.

Example

Maint. & Oper. of School-Owned
Vehicle^{20/}

20/\$400.00

Other expenses - Specify

Private Owned^{21/} Miscellaneous

21/\$50.00

Depreciation allowance of 10%

of the purchase price of all

school-owned vehicles is

allowed \$5,500 x 10% = \$550.^{22/}

22/\$550.00

To determine the district's
maximum allowance based on actual
transportation cost, take 90%^{23/}
of the total actual cost of all
transportation^{24/} to obtain maximum
allowance based on operating
costs.^{25/} The district's gross

23/90%

x

24/2,000

=

25/\$1,800

annual transportation support
allowance represents either the
district's total maximum cal-
culated transportation allowance^{26/}
or the district's maximum allowance
based on operating costs^{27/}
whichever is less.

26/\$2,220.00

or

27/\$1,800.00

METHOD USED TO DETERMINE THE STATE TRANSPORTATION
AID ALLOCATION FOR PRIVATELY OPERATED
PUPIL TRANSPORTATION PROGRAMS

Example

State aid allowance for transportation services, provided under private contracts (including private automobiles) or by common carrier are determined in the same manner as school district-operated programs.

Ohio.--Ohio's State aid act limits State aid allowance for transportation to actual operating expenses, including salaries of drivers, mechanics, supervisors, gasoline, oil, tires, repairs, insurance, etc. A separate appropriation is used for the purchase of school buses. The State transportation aid formula takes into consideration three factors in the allocation of State funds: approved daily bus mileage, number of eligible pupils transported, and type or condition of roads traveled. Roads are classified according to the percentage of hard surfaced roads, gravel, dirt, and severe hills.

METHOD USED TO DETERMINE THE STATE TRANSPORTATION
AID ALLOCATION FOR SCHOOL DISTRICT-OPERATED
PUPIL TRANSPORTATION PROGRAMS

Example

- A. Capital Outlay Allowance
(separate appropriation)

A. Continued--

Example

School districts receiving State aid funds under the foundation program, and otherwise approved and eligible according to certain criteria, are eligible to receive State aid funds for the purpose of purchasing transportation equipment.

To determine the capital outlay allowance for each bus, the district's total tax valuation^{1/} is divided by the district's average daily membership^{2/} (grades 1 through 12) to obtain the district's valuation per child.^{3/}

The total cost of the bus^{4/} or the allowable State ceiling price^{5/} according to the following State ceiling price schedule for equipment (whichever is less) is multiplied by the appropriate percentage factor,^{6/} as indicated in the following State's share percentage table, to obtain the gross allowance.^{7/}

^{1/}\$10,000,000

÷

^{2/}1,000

=

^{3/}\$10,000

^{4/}\$6,500.00

^{5/}\$6,450.00

x

^{6/}69%*

=

^{7/}\$4,450.50

A. Continued--

Example

To determine the net allowance, deduct from the gross allowance^{8/} the amount allowed for the traded-in bus,^{9/} if any, to obtain the total net State aid allowance for capital outlay.^{10/}

^{8/} \$4,450.50
^{9/} \$100.00
 =
^{10/} \$4,350.50

State Ceiling Price Schedule for Equipment

8-12 passenger	\$2,150
16 passenger	2,850
20 passenger	3,150
24-30 passenger	3,400
36 passenger	4,100
42 passenger	4,350
48 passenger	4,800
54 passenger	5,350
60 passenger	6,450
66 passenger, air brakes	7,150
72 passenger, engine forward-transit, air brakes	8,500
73 passenger, rear engine-transit, air brakes	9,500

The above ceiling prices on 60 and 66 passenger buses may be increased \$300 when vehicle is equipped with approved "automatic transmission."

A. Continued--

Example

The above ceiling prices on
60 and 66 passenger buses may be
increased \$100 when vehicle is
equipped with power steering.

PERCENTAGE OF STATE'S SHARE SCHEDULE

<u>Valuation per pupil</u>	<u>State's share</u>	<u>Valuation per pupil</u>	<u>State's share</u>
Less than \$3,200	92%	\$ 9,200 to \$ 9,499	71%
3,200 to 3,499	91%	9,500 to 9,799	70%
3,500 to 3,799	90%	9,800 to 10,099	69%*
3,800 to 4,099	89%	10,100 to 10,399	68%
4,100 to 4,399	88%	10,400 to 10,699	67%
4,400 to 4,699	87%	10,700 to 10,999	66%
4,700 to 4,999	86%	11,000 to 11,299	65%
5,000 to 5,299	85%	11,300 to 11,599	64%
5,300 to 5,599	84%	11,600 to 11,899	63%
5,600 to 5,899	83%	11,900 to 12,199	61%
5,900 to 6,199	82%	12,200 to 12,499	59%
6,200 to 6,499	81%	12,500 to 12,799	57%
6,500 to 6,799	80%	12,800 to 13,099	55%
6,800 to 7,099	79%	13,100 to 13,399	53%

*Applies in this illustration.

A. Continued--

PERCENTAGE OF STATE'S SHARE SCHEDULE
--continued

<u>Valuation per pupil</u>	<u>State's share</u>	<u>Valuation per pupil</u>	<u>State's share</u>
\$7,100 to 7,399	83%	\$13,400 to 13,699	51%
7,400 to 7,699	77%	13,700 to 13,999	49%
7,700 to 7,999	76%	14,000 to 14,299	47%
8,000 to 8,299	75%	14,300 to 14,599	45%
8,300 to 8,599	74%	14,600 to 14,899	43%
8,600 to 8,899	73%	14,900 to 15,199	41%
8,900 to 9,199	72%	15,200 to 15,499	39%
		15,500 and higher	37%

B. Operation AllowanceExample

The State aid formula takes into consideration three factors in allocating State funds for operation: approved daily bus mileage, total number of eligible pupils transported, and type of condition of roads traveled. To determine the allowance for operation:

1. The total number of pupils transported and eligible for

State aid 11/ is multiplied by
\$14 12/ to obtain the allowance

for operation based on the total

$$\frac{11}{1,000} \times \frac{12}{\$14}$$

=

B. Continued--

Example

number of eligible pupils
transported. 13/

13/\$14,000.00

2. The total approved daily
mileage 14/ is multiplied by
the appropriate mileage allow-
ance 15/ according to the
mileage allowance schedule
below, based on the type of
roads over which vehicle
travels, to obtain the mileage
allowance for operation. 16/

14/500

x

15/\$22.00*

=

16/\$11,000.00

MILEAGE ALLOWANCE BASED ON TYPE
OF ROADS OVER WHICH VEHICLE
TRAVELS

All districts are classified
into one of four classifications
on the basis of information
supplied by the county highway
officials in each county.

Road conditionsAllowance

Type A* \$22* per mile

0%-39% gravel roads
0%-29% gravel, rolling
 hills, and
 severe hills
0%-19% severe hills

Type B \$24 per mile

40%-59% gravel roads
30%-49% gravel, rolling
 hills, and
 severe hills

Example

20%-29% severe hills

60%-79%	gravel roads
50%-59%	gravel, rolling hills, and
	severe hills
30%-49%	severe hills

80%-100%	gravel roads
60%-100%	gravel, rolling hills, and severe hills
50%-100%	severe hills

The allowance as computed in
Items 1¹⁷/ and 2¹⁸/ represents 17/ \$14,000.00
the total approved transportation 18/ \$11,000.00
operating allowance 19/ to be 19/ \$25,000.00
included in the district's
foundation program, provided,
however, that where the actual
cost is less than the sum of
the amounts computed in Items 1
and 2 the total amount shall
not exceed the actual cost.

To obtain the school district's total State aid allowance for transportation under the Ohio formula, add the

Example

<u>Capital Outlay Allowance</u>	\$ 4,350.50
<u>Operation Allowance</u>	25,000.00
<u>Contracted Services Allowance</u>	_____
Total State Aid	\$29,350.50

METHOD USED TO DETERMINE THE STATE TRANSPORTATION
AID ALLOCATION FOR PRIVATELY OPERATED
PUPIL TRANSPORTATION PROGRAMS

A. Capital Outlay AllowanceExample

The capital outlay allowance
for transportation services
provided by a private contrac-
tor^{20/} is based on the rated
capacity of each vehicle
according to the schedule.
This allowance is reimbursable
annually for entire period
vehicle is in operation and
can pass State inspection.

^{20/}\$386.00*

SCHEDULE OF CAPITAL OUTLAY
ALLOWANCE FOR PRIVATELY
OPERATED PROGRAMS

<u>Vehicle capacity</u>	<u>Allowance</u>
72 passenger	\$680
66 passenger	542
60 passenger	522
54 passenger	432
48 passenger	386*
42 passenger	352
36 passenger	332
24-30 passenger	276
20 passenger	256
16 passenger	232
8-12 passenger	176

B. Operation AllowanceExample

The State aid formula takes into consideration three factors in allocating State funds for operation: approved daily bus mileage, total number of eligible pupils transported, and type or condition of roads traveled. To determine the allowance for operation:

1. The total number of pupils transported and eligible for State aid 21/ is multiplied by \$14 22/ to obtain the allowance for operation based on the total number of eligible pupils transported. 23/

$$\begin{array}{r} 21/40 \\ 22/\times \\ \$14.00 \end{array}$$

=

$$23/\$560.00$$

2. The total approved daily mileage 24/ is multiplied by the appropriate mileage allowance 25/ according to the mileage allowance schedule below, based on the type of roads over which vehicle travels, to obtain the mileage allowance for operation. 26/

$$\begin{array}{r} 24/30 \\ \times \\ 25/\$24.00^* \end{array}$$

=

$$26/\$720.00$$

B. Continued--

Example

MILEAGE ALLOWANCE BASED ON TYPE
OF ROADS OVER WHICH VEHICLE
TRAVELS

All districts are classified
into one of four classifications
on the basis of information
supplied by the county highway
officials in each county.

<u>Road conditions</u>	<u>Allowance</u>
Type A	\$22 per mile
0%-39% gravel roads	
0%-29% gravel, rolling hills, and severe hills	
0%-19% severe hills	
Type B*	\$24* per mile
40%-59% gravel roads	
30%-49% gravel, rolling hills, and severe hills	
20%-29% severe hills	
Type C	\$26 per mile
60%-79% gravel roads	
50%-59% gravel, rolling hills, and severe hills	
30%-49% severe hills	
Type D	\$28 per mile
80%-100% gravel roads	
60%-100% gravel, rolling hills, and severe hills	
50%-100% severe hills	

*Applies in this illustration.

B. Continued--

Example

The allowance as computed in
 Items 1^{27/} and 2^{28/} represents $\frac{27/}{\$560.00}$
 the total approved transportation $\frac{28/}{\$720.00}$
 operating allowance^{29/} to be $\frac{29/}{\$1,280.00}$
 included in the district's
 foundation program, provided,
 however, that where the actual
 cost is less than the sum of
 the amounts computed in Items 1
 and 2 the total amount shall
 not exceed the actual cost.

To obtain the total private
 contractors State aid allowance
 for transportation under the Ohio
 formula, add the

<u>Capital Outlay Allowance</u>	\$ 386.00
<u>Operation Allowance</u>	1,280.00
Total State Aid	\$1,666.00

METHOD USED TO DETERMINE THE STATE TRANSPORTATION
 AID ALLOCATION FOR PUPILS TRANSPORTED BY
 PUBLIC UTILITY CARRIER AND PRIVATE CAR

A. Public Utility CarrierExample

For pupils transported by
 public utility carrier, a flat
 amount, not to exceed \$36 per
 year for each pupil so

A. Continued--

Example

transported, is allowed. This State aid allocation applies only when expense of such transportation is borne by the school district.

B. Private Cars

The State aid formula takes into consideration three factors in allocating State funds for operation: approved daily bus mileage, total number of eligible pupils transported, and type or condition of roads traveled. To determine the allowance for operation:

1. The total number of pupils transported and eligible for State aid^{30/} is multiplied by \$14^{31/} to obtain the allowance for operation based on the total number of eligible pupils transported.^{32/}

$$\begin{array}{r} 30/2 \\ 31/\$14.00 \\ \times \end{array}$$

=

$$32/\$28.00$$

2. The total approved daily mileage^{33/} is multiplied by the appropriate mileage allowance^{34/} according to the mileage

$$\begin{array}{r} 33/2 \\ 34/\$26.00^* \\ \times \end{array}$$

B. Continued--

Example

allowance schedule below, based
on the type of roads over which
vehicle travels, to obtain the
mileage allowance for opera-
tion. 35/

=

35/\$52.00

MILEAGE ALLOWANCE BASED ON TYPE
OF ROADS OVER WHICH VEHICLE
TRAVELS

All districts are classified
into one of four classifications
on the basis of information
supplied by the county highway
officials in each county.

<u>Road conditions</u>	<u>Allowance</u>
Type A	\$22 per mile

0%-39% gravel roads
0%-29% gravel, rolling
hills, and
severe hills
0%-19% severe hills

Type B	\$24 per mile
--------	---------------

40%-59% gravel roads
30%-49% gravel, rolling
hills, and
severe hills
20%-29% severe hills

Type C*	\$26* per mile
---------	----------------

60%-79% gravel roads
50%-59% gravel, rolling
hills, and
severe hills
30%-49% severe hills

B. Continued--

Example

<u>Road conditions</u>	<u>Allowance</u>
Type D	\$28 per mile
80%-100% gravel roads	
60%-100% gravel, rolling hills, and	
severe hills	
50%-100% severe hills	

The allowance as computed in Items 1^{36/} and 2^{37/} represents $\frac{36}{\$28.00}$
the total approved transportation $\frac{37}{\$52.00}$
operating allowance^{38/} to be $\frac{38}{\$80.00}$
included in the district's
foundation program, provided,
however, that where the actual
cost is less than the sum of
the amounts computed in Items 1
and 2, the total amount shall
not exceed the actual cost.

Wisconsin.--In order to participate in (1) the flat grant portion of the State aid allocation for transportation, all districts must provide transportation to all resident pupils residing two or more miles from school. No fares can be charged to parents or guardians and failure to provide transportation jeopardizes all State aid allocations for which the district may be eligible. This portion of the State aid allocation is distributed on the basis of \$24 per school year, per pupil transported to and from school whose residence is

at least two miles and not more than five miles by the nearest travel route from the public school attending, and \$36 per school year, per pupil transported to and from school whose residence is more than five miles by the nearest traveled route from the school attended, and (2) the equalizing portion of the State transportation fund provides additional aid to those districts unable to meet approved transportation costs with a 2-mill levy on the district's equalized valuation plus the flat-grant portion of the State aid allocation for transportation. The transportation aid to any district or municipality shall not exceed actual cost.

METHOD USED TO DETERMINE THE STATE TRANSPORTATION
AID ALLOCATION FOR SCHOOL DISTRICT-OPERATED
PUPIL TRANSPORTATION PROGRAMS

Example

In order to compute the State aid allocation for which the district may be eligible, it is necessary to determine the district's allowable annual transportation costs.

A LOCAL DISTRICT'S ACTUAL ALLOWABLE
ANNUAL TRANSPORTATION COSTS

COSTS

Salaries^{1/}

^{1/}\$1,000.00

Includes all salaries of
transportation supervisors, drivers,
mechanics and garage employees,

+

Example

clerks and other transportation employees. Contracted services and/or fares paid Pub. Carriers.^{2/}

^{2/}None

Includes expenditures to owners who operate school buses and small vehicles to transport pupils; to contractors who own a part of a bus, such as chassis (even the school district owns the body); and to parents for transporting groups of children, including their own children or transporting only their own children.

Insurance^{3/}

^{3/}\$50.00

Includes expenditures for public liability, property damage, medical care, collision, fires, and theft insurance.

+

This includes expenditures for insurance on garages as well as transportation equipment.

Operation and Maintenance^{4/}

^{4/}\$400.00

Includes expenditures for supplies and other expenses for the operation and maintenance of

+

Example

district-owned pupil transportation
vehicles and district-operated
pupil transportation garages.

Overcharges Returned ^{5/}	5/ None
Depreciation-15% of net cost ^{6/}	6/ \$825.00 ⁺

The net cost means the
dollar amount expended to purchase
the equipment reduced by any trade-in.

Other Costs ^{7/}	7/ None
Handicapped Transportation Costs ^{8/}	8/ \$500.00 ⁺
TOTAL COSTS ^{9/}	9/ \$2,775.00 ⁼

State Schedule of Annual Per Pupil Allowances*

<u>Category</u>	<u>Distance Transported</u>	<u>Number of School Days</u>	<u>Per Pupil Allowance</u>
I	2 miles but less than 5 miles	90 days or less	\$12
II	Over 5 miles	90 days or less	\$18
III	2 miles but less than 5 miles	91 days or less	\$24
IV	Over 5 miles	91 days or less	\$36

Example

(1) Compute the total number
of pupils in district transported

*Reduced proportionately in cases where pupils are transported for less than a full school year because of nonenrollment as a result of transfers, districts must maintain schools at least 180 days in order to participate in the Wisconsin Public School Fund.

Example

2 miles and not more than 5 miles
for 90 days or less. 10/ The total
number so transported is multiplied
by a per pupil allowance of \$1211/
to obtain the total annual allowance
for pupils transported in category
Number I. 12/

$$\begin{array}{r} \underline{10}/_3 \\ \times \\ \underline{11}/\$12.00 \\ = \\ \underline{12}/\$36.00 \end{array}$$

(2) Compute the total number
of pupils in district transported
over 5 miles for 90 days or less. 13/
The total number so transported is
multiplied by an allowance of \$1814/
to obtain the total annual allowance
for pupils transported in category
Number II. 15/

$$\begin{array}{r} \underline{13}/_2 \\ \times \\ \underline{14}/\$18.00 \\ = \\ \underline{15}/\$36.00 \end{array}$$

(3) Compute the total number
of pupils in district 2 miles and
not more than 5 miles for 91 days
or more. 16/ The total number so
transported is multiplied by a per
pupil allowance of \$2417/ to obtain
the total annual allowance for
pupils transported under category
Number III. 18/

$$\begin{array}{r} \underline{16}/_{20} \\ \times \\ \underline{17}/\$24.00 \\ = \\ \underline{18}/\$480.00 \end{array}$$

(4) Compute the total number
of pupils in district transported

Example

over 5 miles for 91 days or more.	<u>19/</u>	<u>19/</u> 30
The total number so transported is		
multiplied by a per pupil allowance		x
of \$36	<u>20/</u>	<u>20/</u> \$36.00
to obtain the total annual		
allowance for pupils transported		=
under category Number IV.	<u>21/</u>	<u>21/</u> \$1,080.00

Add the district-annual per
pupil allowance under:

Category I	<u>22/</u>	<u>22/</u> \$36.00
Category II	<u>23/</u>	<u>23/</u> \$36.00
Category III	<u>24/</u>	<u>24/</u> \$480.00
Category IV	<u>25/</u>	<u>25/</u> \$1,080.00
Handicapped transportation		+
State aid	<u>26/</u>	<u>26/</u> \$500.00*

To obtain the district's		
total annual allowance for all		=
pupils transported.	<u>27/</u>	<u>27/</u> \$2,132.00

If the district is unable		
to meet the approved transportation		
costs	<u>28/</u>	<u>28/</u> \$2,775.00
with a local levy on the		
equalized valuation of the district	<u>29/</u>	<u>29/</u> \$800,000.00
of 2 mills	<u>30/</u>	<u>30/</u> .002
in support of the		x
program	<u>31/</u>	<u>31/</u> \$1,600.00
plus the flat-grant and		=
		+

*In addition to a flat grant allocation, the State reimburses a percentage of the difference between this flat grant allocation and the actual cost. The actual percentage would vary from district depending on the district's total operating costs, total expenditures, equalized valuation and local tax levy.

Example

supplemental State aid allowances, 32/ 32/\$2,132.00
 the State provides the additional
 amount needed through the equalizing
 portion of the State aid fund for
 transportation to enable districts
 to meet the total approved cost of
 the program.

To compute the allowance for
 those districts eligible to receive
 this additional State aid, the
 district's total pupil transporta-
 tion operation costs 33/ less the
 district's State aid allowance
 under the flat grant portion of
 the State aid allocation for trans-
 portation 34/ is obtained. This
 difference equals the district's
 net transportation costs. 35/ A
 percentage of the difference or
 the district's net cost is then
 computed 36/ to obtain the district's
 supplemental or equalizing portion
 of the State aid allowance for
 pupil transportation. 37/

33/\$2,775.00

-

34/\$2,132.00

=

35/\$643.00

x

36/77.5%*

=

37/\$498.33

*The actual percentage would vary from district to district depending on the district's total operating costs, total expenditures, equalized valuation and the local tax levy.

Example

To determine the district's total State aid allocation, add the district's allowance under the flat grant portion of the State aid allocation for transportation^{38/} plus the district's supplemental State aid allocation^{39/} to obtain the district's total State aid allowance for transportation.^{40/}

^{38/} \$2,132.00

+

^{39/} \$498.33

=

^{40/} \$2,630.33

METHOD USED TO DETERMINE THE STATE TRANSPORTATION
AID ALLOCATION FOR PRIVATELY OPERATED
PUPIL TRANSPORTATION PROGRAMS

Example

State aid allowances for transportation services provided under private contracts (including private automobiles) or by common carrier are determined in the same manner as school district-operated programs.

The Five State Plans in Terms of the
Twelve Evaluating Criteria

As the final aspect of this analysis of the State aid plans for financing pupil transportation in the Great Lakes States, the five State plans are examined in terms

of the twelve evaluating criteria.¹²

Group I Criteria for Assessing the
State Plan's Over-all Adequacy
and Equitableness

Sufficient State support.--A State plan for financing pupil transportation should:

Provide sufficient funds to enable local units with reasonable local effort to operate safe, economical and efficient systems of transportation.

(Criterion Number 1)

Four of the five State directors found Criterion Number 1 acceptable; the Illinois director indicated that the criterion was only acceptable in part. The opinion of the transportation directors in the Great Lakes States relative to this criterion generally reflects the opinion of a majority of the fifty State directors of pupil transportation.

Forty-three State directors found the criterion acceptable, four indicated it was acceptable in part, and three States expressed no opinion.

The transportation directors in all five Great Lakes States indicated that the criterion was recognized in their State plan for financing pupil transportation. The following excerpts from these State plans reflect the acceptance of this criterion:

¹²Chapter IV.

Illinois

State aid reimbursement under the Illinois State aid formula is based on the district's actual allowable annual transportation costs. State approved programs are reimbursed at the rate of 50 per cent of the cost of such transportation according to the State formula or at the rate of \$16 to \$32 per pupil transported as determined by the State density formula, whichever is less.

Indiana

A district's maximum allowance under the Indiana formula represents 90 per cent of the actual cost or the maximum transportation allowance calculated according to the State aid formula, whichever is less.

School districts (incorporations) eligible for State aid under the general provision of the State foundation program are also eligible to participate in the pupil transportation State aid portion of the State foundation program. The State allowance for school transportation is allocated on the basis of a formula applied to a base rate of \$20 per pupil.

Michigan

The State aid formula in Michigan limits the State aid allowance to actual cost or \$60 per pupil, whichever is less.

Ohio

The Ohio State Aid Act limits the State aid allowance to actual operating costs. Separate appropriation is used for purchasing school bus equipment.

Wisconsin

The flat grant portion of the Wisconsin State aid allocation for transportation is distributed on the basis of \$24 per pupil per year for pupils residing at least two and not more than five miles from school and \$35 per pupil per year for pupils residing more than five miles from school. The equalizing portion of the State transportation fund provides additional aid to districts unable to meet approved transportation costs, with a 2-mill levy on the district's equalized valuation.

Sufficient State support (continued).--A State plan for financing pupil transportation should:

Tend to compensate for the additional financial burden that falls upon school districts which must provide pupil transportation. (Criterion Number 2)

All five State directors found Criterion Number 2 acceptable. The opinion of the transportation directors in the Great Lakes States relative to this criterion reflects generally the opinion of a majority of the fifty State directors of pupil transportation.

Thirty-seven State directors found the criterion

acceptable, seven indicated it was acceptable in part, two indicated it was not acceptable, and four States expressed no opinion.

The transportation directors of all five Great Lakes States indicated that the criterion was recognized in their State plans for financing pupil transportation. The following excerpts from these State plans clearly reflect acceptance of this criterion:

Michigan

In order to participate in general distribution of State aid a school district must levy at least 5 mills (7 mills required for full participation) on the State equalized value of the district.

Ohio

The State foundation program of education includes allowance for teachers' salaries . . . transportation . . . and other approved current expenses. A participating school must levy 12.5 mills against the district's assessed valuation in order to receive State aid.

Indiana equalizes its State aid allocation for transportation, Illinois does not, and Wisconsin equalizes a portion of its State aid for pupil transportation.

Provision for capital outlay.--A State plan for financing pupil transportation should:

Take into account provisions for capital outlay expenditures, such as the purchase of school buses,

bus equipment, and the erection of bus shops.

(Criterion Number 3)

Four State directors found Criterion Number 3 acceptable, the Illinois director indicated that the criterion was acceptable only in part. The opinion of the transportation directors in the Great Lakes States relative to this criterion generally reflects the opinion of a majority of the fifty State directors of pupil transportation.

Thirty State directors found the criterion acceptable, eleven indicated it was acceptable in part, six indicated it was not acceptable, and three States expressed no opinion.

The transportation directors in all five Great Lakes States indicated that this criterion was recognized in their State plan for financing pupil transportation. The following excerpts from these State plans reflect acceptance of this criterion:

Illinois

Depreciation allowance equals 15 per cent of the net cost of equipment.

Indiana

Ten per cent depreciation allowance on the purchase price of the school bus equipment is allowed.

Michigan

Allowance for capital outlay is based on a per

seat allowance.

Ohio

Capital outlay in Ohio is based on the State ceiling price for equipment.

Wisconsin

Depreciation allowance represents 15 per cent of the net cost. The net cost represents the dollar amount expended for the equipment reduced by any trade-in allowance.

Provision for capital outlay (continued).--A State plan for financing pupil transportation should:

Provide for amortization of capital outlay expenditures of school buses and school bus garages beyond the current year. (Criterion Number 4)

All five State directors found Criterion Number 4 acceptable. The opinion of the transportation directors in the Great Lakes States relative to this criterion reflects generally the opinion of a majority of the fifty State directors of pupil transportation.

Thirty State directors found the criterion acceptable, nine indicated it was acceptable in part, eight indicated it was not acceptable, and three States expressed no opinion.

The transportation directors in all five Great Lakes States indicated the criterion was recognized in their State plans for financing pupil transportation. The following data tend to indicate acceptance of this criterion.

Illinois

Time required to depreciate the school bus for State funds is seven years.

Sources of funds and methods of paying for school buses are bond issues, short-term loans, lease purchase or installment (three year period), reimbursement from the State, and current revenue.

Indiana

Time required to depreciate the school bus is ten years.

Sources of funds and method of paying for school buses are bond issues, lease purchase or installment (for period of six years at an interest rate not to exceed 4 per cent), reimbursement from the State, and current revenue.

Michigan

State aid allowance for depreciation is \$14 per pupil transported per year not to exceed manufacturer's rated capacity of the vehicle.

Sources of funds and methods of paying for school buses are bond issues, lease purchase or installment, purchase on six-year plan, reimbursement from the State, and current revenue.

Ohio

Sources of funds and methods of paying for school buses are short-term loans (three years at interest

rate not to exceed 4 per cent), lease purchase or installment (four years with interest rate not to exceed 4 per cent), reimbursement from the State, and current revenue.

Wisconsin

Time required to depreciate school buses for State funds is seven years in figuring cost on 2-mill program.

Sources of funds and methods of paying for school buses are bond issues, short-term loans borrowed from the State, lease purchase or installment, and current revenue.

Cost factors considered in the formula.--A State plan for financing pupil transportation should:

Provide for consideration of factors beyond the control of local units such as population density, road conditions, and geographical barriers.

(Criterion Number 8)

Three State directors found Criterion Number 8 acceptable. The Illinois director indicated that the criterion was only acceptable in part, while the Wisconsin director indicated it was not acceptable. The opinion of the transportation directors in the Great Lakes States relative to this criterion again generally reflects the opinion of a majority of the fifty State directors of pupil transportation in regard to this particular criterion.

Twenty-seven State directors found the criterion acceptable, sixteen indicated it was acceptable in part, four indicated it was not acceptable, and three States expressed no opinion.

In ranking the twelve criteria in order of acceptance frequency, Criterion Number 8 ranked last in order of acceptance frequency. As was apparently true nationally,¹³ the directors in the Great Lakes States were also unable to agree as to those specific factors affecting cost that should be incorporated into a State aid formula to ensure its objectivity and equitableness. The transportation directors in all five Great Lakes States indicated that the criterion was recognized in their State plans for financing pupil transportation. The following data tend to indicate acceptance of this criterion:

Illinois

Factors affecting cost are incorporated into the Illinois formula, such as number of transported pupils, mileage, density, and depreciation.

Indiana

Factors affecting cost are incorporated into the Indiana formula, such as number of transported pupils, density, and depreciation.

Michigan

Factors affecting cost are incorporated into the Michigan formula, such as capital outlay allowance

¹³Table 16, p. 113.

for equipment, density, number of pupils transported, and mileage.

Ohio

Factors affecting cost are incorporated into the Ohio formula, such as number of transported pupils, mileage, road conditions, and capital outlay allowance for equipment.

Wisconsin

Factors affecting cost are incorporated into the Wisconsin formula, such as number of transported pupils, depreciation, salaries, and distance transported.

An objective State aid formula.--A State plan for financing pupil transportation should:

Provide for distribution of State aid upon the basis of an objective formula. (Criterion Number 11)

All five State directors found Criterion Number 11 acceptable. The opinion of the transportation directors in the Great Lakes States relative to this criterion generally reflects the opinion of the fifty State directors of pupil transportation in regard to this particular criterion.

Forty-seven State directors found the criterion acceptable, and three States expressed no opinion. The transportation directors in all five Great Lakes States indicated that the criterion was recognized in

their State plans for financing pupil transportation.

Flexibility of the plan.--A State plan for financing pupil transportation should:

Permit at the local level ready flexibility for making adjustments in the transportation program in such cases as consolidation, fires, etc.

(Criterion Number 6)

Four State directors found Criterion Number 6 acceptable. The Illinois director indicated that the criterion was only acceptable in part. The opinion of the transportation directors in the Great Lakes States relative to this criterion reflects the opinion of a majority of the fifty State directors of pupil transportation.

Forty-one State directors found the criterion acceptable, three indicated that it was acceptable in part, one indicated that it was not acceptable, and five States expressed no opinion.

The transportation directors in all five Great Lakes States indicated that the criterion was recognized in their State plans for financing pupil transportation.

Subsistence in lieu of transportation.--A State plan for financing pupil transportation should:

Provide for subsistence for pupils in lieu of transportation, within reasonable limitations.

(Criterion Number 9)

Three State directors found Criterion Number 9

acceptable. The Illinois and Indiana directors indicated that the criterion was only acceptable in part. The mixed reactions of transportation directors in the Great Lakes States relative to the criterion reflects the mixed reaction of the fifty State directors of pupil transportation to this particular criterion.

Thirty-one State directors found the criterion acceptable, seven indicated it was acceptable in part, eight indicated it was not acceptable, and four States expressed no opinion.

The transportation directors in all five Great Lakes States indicated that the criterion was recognized in their State plans for financing pupil transportation.

Group II Criteria for Assessing the State
Plan's Provisions for Stimulating
the Attainment of Desirable
Goals and Standards

Safe, efficient, and economical programs.--A State plan for financing pupil transportation should:

Tend to stimulate the attainment of desirable standards in school bus equipment, maintenance, operation, and the employment of personnel.

(Criterion Number 5)

Four State directors found Criterion Number 5 acceptable. The Illinois director indicated that the criterion was acceptable only in part. The opinion of the majority of the transportation directors in the Great Lakes States relative to this criterion also reflects

generally the opinion of a majority of the fifty State directors of pupil transportation on this particular criterion.

Forty-five State directors found the criterion acceptable, two indicated it was acceptable in part, and three States expressed no opinion.

The directors in all five of the Great Lakes States indicated that the criterion was recognized in their State plans for financing pupil transportation. The following indicates a number of ways by which the criterion is implemented in the State plans of the Great Lakes States:

Illinois

State provisions are made for: school bus routes and route standards, school bus operating regulations, stopping of buses at railroad crossings, laws regarding passing school buses on the highway, contracts for transportation, insurance or liability, and records and reports for transportation.

Indiana

State provisions are made for: school bus inspections, school bus operating regulations, speed limit specifically for school buses, stopping buses at railroad crossings, laws regarding passing school buses on the highway, contracts for transportation, and insurance or liability.

Michigan

State provisions are made for: school bus routes and route standards, stopping of buses at railroad crossings, laws regarding passing school buses on the highway, contracts for transportation, and insurance or liability.

Ohio

State provisions are made for: stopping of buses at railroad crossings, laws regarding passing school buses on the highway, insurance or liability, and records and reports for transportation.

Wisconsin

State provisions are made for: school bus inspections, school bus routes and route standards, school bus operating regulations, speed limit specifically for school buses, stopping of buses at railroad crossings, laws regarding passing school buses on the highway, contracts for transportation, insurance or liability, and records and reports for transportation.

Desirable school district organization.--A State plan for financing pupil transportation should:

Not tend to discourage desirable organization of local administrative units and attendance areas.

(Criterion Number 10)

Four State directors found Criterion Number 10 acceptable. The Illinois director indicated that the

criterion was acceptable only in part. The opinion of the majority of the transportation directors in the Great Lakes States relative to this criterion reflects generally the opinion of a majority of the fifty State directors of pupil transportation in regard to this particular criterion.

Forty-five State directors found the criterion acceptable, two indicated it was acceptable in part, and three States expressed no opinion.

The directors in all five of the Great Lakes States indicated that the criterion was recognized in their State plans for financing pupil transportation.

Broadening and extending the educational program.--

A State plan for financing pupil transportation should:

Encourage schools to broaden and extend the school program through the use of school buses.

(Criterion Number 12)

Three State directors found Criterion Number 12 acceptable. The Indiana director indicated that the criterion was not acceptable. The opinion of the majority of transportation directors in the Great Lakes States relative to this criterion reflects quite generally the opinion of a majority of the fifty State directors of pupil transportation in regard to this particular criterion.

Thirty-four State directors found the criterion acceptable, eleven indicated it was acceptable

in part, one indicated it was not acceptable,
and four States expressed no opinion.

The directors in all five of the Great Lakes States indicated that the criterion was recognized in their State plans for financing pupil transportation. Table 20 indicates in some detail the means by which this criterion is implemented in the Great Lakes States.

Adequate records and reports.--A State plan for financing pupil transportation should:

Require a local school district or local administrative unit to maintain adequate accounting records and reports. (Criterion Number 7)

Four State directors found Criterion Number 7 acceptable. The Wisconsin director indicated that the criterion was acceptable only in part. The opinion of the majority of the transportation directors in the Great Lakes States relative to this criterion reflects the opinion of a majority of the fifty State directors of pupil transportation in regard to this particular criterion.

Forty-four State directors found the criterion acceptable, two indicated that it was acceptable in part, and four States expressed no opinion. The directors in all five of the Great Lakes States indicated that the criterion was recognized in their State plans for financing pupil transportation.

TABLE 20.--State provisions for and practices in transporting pupils for curricular or extracurricular purposes in the five Great Lakes States

State	Specific authorization in State law	General practices, not mentioned in law	Method of financing
Illinois		Vehicles are used for student activities but must cover school bus sign (attorney general has rules that a vehicle cannot be considered a school bus except when on its regular route).	May use public funds--may also use activity funds.
Indiana	The school bus may be used for group movements to and from athletic games, contests, or other school functions under the direct auspices of the public schools or for such other purposes as may be approved by the committee *** on recommendation of the trustees or board of trustees.		Local funds may be used--also activity funds.
Michigan	The board of education of any school district may furnish transportation for its resident or nonresident pupils attending school in the district to educational programs at county or community fairs, to health clinics in or outside the district, and to educational functions in any other school district or community.	Student spectators to athletic contests.	May use district or activity funds.
Ohio		Authorized by State director and provided in accordance with regulations recommended by the Ohio Advisory Committee on Transportation.	May use district funds. Cannot charge fees to students but may use activity funds.
Wisconsin	Any school district may provide transportation for pupils, parents, teachers, school doctors, dentists, and nurses to any extracurricular school activity such as a school athletic contest, school game, school field or any other similar school trip under supervision of competent adult employee when bus is driven by a regular driver, when the bus is insured, when approved by the principal or person with comparable authority, and when trip is in State or within 50 miles of its borders.		Any school district may make a charge for such transportation to be paid by the persons transported.

Source: E. Glenn Featherston, and John B. Murray, *State Provisions for Transporting Pupils*. Office of Education, United States Department of Health, Education, and Welfare (Washington: Government Printing Office, 1960), Table III, pp. 12-15.

CHAPTER VI

SUMMARY, CONCLUSIONS, AND RECOMMENDATIONS

Emphasis in this study has been focused upon determining whether or not State plans for financing pupil transportation could be profitably analyzed, using a particular approach, thus providing a possible pattern for future studies of this type. No attempt was made to evaluate the strengths and/or weaknesses of any single State plan.

In order to accomplish this end, it was necessary to:

- A. Identify and analyze the common characteristics of State plans for financing pupil transportation in the fifty States (Chapter III);
- B. Ascertain the current status of certain previously validated criteria for evaluating State plans for financing pupil transportation (Chapter IV);
- C. Analyze in detail the State aid plans for financing pupil transportation in the five Great Lakes States of Michigan, Illinois, Indiana, Ohio, and Wisconsin, specifically in terms of:

the statutory basis, the relationship of State transportation aid to the total State program,

the State aid distribution plan (formulas) for allocating pupil transportation aid, and

in relation to the aforementioned characteristics and criteria (Chapter V); and finally

- D. Determine, on the basis of this analysis, whether or not recommendations could be evolved for the possible improvement of State plans for financing pupil transportation in the United States.

In the application of the particular approach employed in this study to analyze the State plans for financing pupil transportation, certain generalizations were noted which could prove helpful to those States which are now or will eventually be involved in appraising their State plans. These generalizations concern two of the important elements of this study; namely, (1) the current characteristics of State plans for financing pupil transportation, and (2) the criteria for evaluating State plans for financing pupil transportation.

The Current Characteristics of State Plans

State provisions for transporting pupils.--

1. The legal basis for providing pupil transportation in most States rests not on a single law but on a number of permissive and mandatory laws. There is little uniformity in statutory provisions for transporting pupils in the various States.
2. Each year more State educational agencies are confronted with the necessity to formulate and publish

rules and regulations in ever greater detail governing the transportation of children.

3. Adherence to State requirements relative to the type and quality of employed personnel, school bus equipment and its operation, and the use of uniform records, reports, and financial accounts constitutes a basis and/or prerequisite, in a number of States, for local operating units to receive State transportation aid.

The relationship of State transportation aid to the State aid program.--

1. The over-all State aid program may be more easily and as objectively administered if transportation is computed as a distinct item. This may account, in part, for the fact that the State aid allowance for transportation in several States is now equalized independently rather than through a "single fund" or "lump sum" foundation program.

Methods used for distributing State transportation aid.--

1. More than half the States that allocate transportation aid use some type of formula for computing the transportation need of the local administrative units, although in a number of these States the formula is used only to set a ceiling for the cost for which the State will reimburse.
2. The basis on which State aid funds for pupil transportation are allocated in the remaining States varies

from the flat grant allocations to State aid allowances allocated on the basis of the actual, approved or average cost of operating a local program, or on a prescribed percentage of the local cost.

3. The allocation of State aid for transportation on the basis of matching special-purpose grants introduces many inequalities. Districts most in need of providing the service are often the very districts least able, because of a low tax base, to match the State funds for which they are eligible.
4. The shortcomings inherent in allocating State aid funds for pupil transportation on the basis of matching special-purpose State aid grants are also found in those States that allocated State transportation aid on the basis of special-purpose per capita flat grants because State aid allocated on this basis is all too often insufficient.
5. In those States that distribute the State aid allocation for pupil transportation on the basis of a predetermined percentage of the actual cost of the program, inequalities can result if the State aid reimbursement does not represent a reasonable proportion of the actual cost of the program at the local level.

State aid formulas for pupil transportation.--

1. As a result of the limitations inherent in many of the earlier methods States employed to finance pupil

transportation, such as per pupil flat grant allowances, matching State aid allowances, or allowances based on a percentage of the cost of the program, a considerable number of States have developed State aid formulas for the more equitable distribution of State support.

These State aid formulas are viewed as a means by which a State can determine local need and ability according to prescribed and predetermined criteria.

2. In several of the formulas the actual cost of the program at the local level represents a direct factor in computing the State aid allowance. State aid formulas vary as to the number of factors to be taken into consideration in calculating the allowance for pupil transportation. Most formulas, however, consider such factors as number of pupils transported, number of school buses utilized, number of bus miles traveled, density, road conditions, and depreciation of equipment.
3. A majority of the States that provide State transportation aid calculate their State aid allowances according to a prescribed State aid formula. Although considerable progress toward the development of State aid formula has been made over the years, it is doubtful that there is currently in existence a formula which may not in some respect be improved.

Cost factors incorporated into the formula.--

1. It has been determined through research that there are

relationships between certain factors and school transportation operating costs.

The Criteria for Evaluating State Plans

In determining the status of certain selected criteria for evaluating State plans for financing pupil transportation, it was found that the criteria fell into two general categories or groupings: (1) criteria pertaining to the assessment of the State plan's over-all adequacy and equitableness, and (2) criteria pertaining to the assessment of the State plan's provisions for stimulating the attainment of desirable goals and standards.

Within each of these two groupings specific criteria appear to be especially appropriate in focusing attention, for evaluating purposes, on certain qualities or important considerations within the over-all State plan for financing pupil transportation. The twelve criteria employed in this study, therefore, should prove useful to any State engaged in appraising its State plan for financing pupil transportation.

Assessing the over-all adequacy and equitableness of a State plan.--

1. A State plan should make adequate provision for sufficient State support (Criteria Numbers 1 and 2).
2. A State plan should make adequate provision for capital outlay expenditures (Criteria Numbers 3 and 4).
3. A State plan should make adequate provision for the consideration of cost factors in the formula

(Criterion Number 8).

4. A State plan should make adequate provision for an objective State aid formula (Criterion Number 11).
5. A State plan should make adequate provision for flexibility (Criterion Number 6).
6. A State plan should make adequate provision for subsistence in lieu of transportation (Criterion Number 9).

Assessing provisions in a State plan for stimulating the attainment of desirable goals and standards.--

1. A State plan should make adequate provision for stimulating the attainment of safe, efficient, and economical programs (Criterion Number 5).
2. A State plan should make adequate provision for stimulating the attainment of desirable school district organization (Criterion Number 10).
3. A State plan should make adequate provision for stimulating the broadening and extending of the educational program (Criterion Number 12).
4. A State plan should provide for the maintenance of adequate records and reports (Criterion Number 7).

Conclusions

1. The State plans for financing pupil transportation can be profitably analyzed in terms of: (a) their characteristics, (b) the twelve evaluating criteria, and (c) their State distribution plans (or formulas) for allocating transportation aid.

2. The fifty State plans for financing pupil transportation do in fact recognize by various means and to varying degrees the twelve evaluating criteria that a majority of the fifty State directors generally agree should be recognized in any adequate State plan.
3. Each State has a unique problem with respect to the development of its State plan for financing pupil transportation. Consequently, it is questionable whether any one plan or formula could completely meet the need of each of the fifty States.
4. Various methods and techniques are employed by the fifty States in allocating State aid support for pupil transportation. Different approaches to the problem may well strengthen the evolutionary process since diversity provides for the broad experimentation that is essential in developing more equitable methods of financing pupil transportation.
5. There are definite limits to the extent to which complicated formulas can be used in allocating State transportation aid. It would be impractical, if not impossible, to combine all the factors affecting the cost of transportation into a State aid formula. Most recent studies have been directed toward the developing of school transportation formulas of relatively simple design.
6. The availability of current, reliable, and reasonably detailed school transportation cost data at the State level is essential to the development and maintenance

of an objective and equitable State aid formula for allocating State transportation aid.

7. The techniques and procedures employed to promote safety, efficiency, adequacy, and economy in the operation of school transportation at both the State and local level must be based upon a sound philosophy of the social and educational role of pupil transportation, and State plans for financing pupil transportation must be developed to encourage and support this philosophy.

Recommendations for Further Study

It is recommended that on the basis of a series of regional studies similar to this study a relatively complete account be compiled and maintained as to the current status of State plans for financing pupil transportation in the United States.

It is recommended, moreover, that the twelve evaluating criteria presented in this study be further delineated and that a checklist be developed to designate specific items to be evaluated with respect to each of the twelve criteria. For example, under Criterion Number 7, adequate records and reports, a minimum list of necessary or desirable records and reports would be very helpful in evaluating the adequacy of a given State plan. Such a guide would be useful to State officials in conducting their own evaluation studies.

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APPENDICES

APPENDIX A

**COVER LETTER AND FORMAT GUIDE, USED IN COLLECTING
DATA ON THE PUPIL TRANSPORTATION STATE AID
FORMULAS IN THE FIVE GREAT LAKES STATES**

November 27, 1962

Dear

This letter and the enclosed materials pertain to the proposed study I discussed with you during the New Orleans Conference. As I mentioned during my discussion with you, there is a great deal of interest and apparently a need at the present time for information in regard to the State aid plans for financing pupil transportation. For this reason we are now engaged in the process of developing plans and collecting information on State aid programs for financing pupil transportation in Region V, the Great Lakes States, and eventually for the 50 States.

We propose to organize the information we collect in such a way as to indicate the method used (including formulas) to determine the State transportation aid for a typical school district or basic local administrative unit in each State. Our present plans are to contact the pupil transportation directors in five States: Michigan, Ohio, Indiana, Illinois, and Wisconsin for assistance during the first phase of the study.

The enclosed copy of the Maryland plan for financing pupil transportation indicates the way in which we propose to organize the information received from each of the States. If you would use this State plan as a guide in providing us with the necessary information for your State, it will help us to adapt the information you provide for our format. Any suggestions you might have relative to the completeness and clarity of our proposed format would be sincerely appreciated.

We would appreciate your assistance in supplying us with the following information and materials in regard to the State transportation aid program in your State:

1. Please describe briefly the method used (including formulas) in determining State transportation aid for school districts or basic local administrative units in your State during 1960-61.
 - a. Would you please use as an example an actual school district in your State, preferably one that is eligible for all transportation funds that are available, including the transportation of the handicapped, etc.
 - b. Would you also provide us with all the actual information about the school district or basic local administrative unit that you would need to determine the district's State aid allowance for transportation.
 - c. Would you please describe briefly the method used (including formulas) in determining State transportation aid for privately operated pupil transportation programs, if the method differs from the one used to determine State transportation for district-operated transportation programs.
 - d. Please describe briefly the method used (including formulas) to determine the State transportation for pupils transported by private cars.
2. If State transportation aid is not calculated separately from general State aid or the foundation program, please describe each provision for taking into consideration the transportation factor in the calculation or in the use of general State aid or foundation programs. Be sure to give us all formulas used in the calculation.

3. If county funds or funds from other sources are distributed to school districts or basic local administrative units for pupil transportation, please describe the method used for allocating these funds.
4. For each method or formula described in 1, 2, or 3, please attach the computation of aid allowance under such provision or formula, as it applies to an actual school district in your State.
5. Would you also send to us: (1) a copy of your administrative rules and regulations relative to the distribution of transportation funds, and/or (2) any other available printed materials which describe your State program for financing pupil transportation.
6. Enclosed please find A TENTATIVE DRAFT OF CRITERIA FOR EVALUATING STATE PROGRAMS FOR FINANCING PUPIL TRANSPORTATION. Would you please give us the information requested on this form as well as your personal opinion as to the validity of these criteria in evaluating a State program for financing pupil transportation.

If necessary, after having the opportunity to study the materials and information you send, I hope to be able to visit with you to discuss the study and to clarify any questions which may develop during this preliminary stage.

We realize and appreciate the fact that in asking you to supply us with the information we have requested you will be involved in a great deal of extra work, but we know you will realize the importance of a study in this particular area of school transportation and will therefore assist us in our efforts.

Sincerely yours,

John B. Murray

Enclosures 2

NOTE: Letter sent to State directors of pupil transportation in Michigan, Illinois, Indiana, Ohio and Wisconsin.

Maryland--State Plan for Financing
Pupil Transportation

The State minimum or foundation program of education includes allowances for teachers' salaries, transportation, and other current expenses. A participating school district must levy 7.5 mills against the district's assessed valuation in order to receive State equalization aid. The amount of State equalization aid for which the district is eligible is the amount by which the cost of the minimum or foundation program exceeds the sum of the required local 7.5 mill levy, and certain additional basic State aids paid to the district based on the number of pupil and teacher units. State aid is also provided for the minimum salaries allowed supervisory and administrative personnel.

The Pupil Transportation Formula for Allocating
State Aid Funds in Maryland

The Maryland School Code limits the State aid allowance for transportation to . . . the necessary actual cost of transporting pupils to public schools when such transportation is approved by the State superintendent.

The State transportation aid formula takes into consideration three factors in allocating State transportation aid funds: depreciation of equipment, salary of drivers, and operating costs and maintenance.

METHOD USED TO DETERMINE THE STATE TRANSPORTATION
AID ALLOCATION FOR SCHOOL DISTRICT-OPERATED
PUPIL TRANSPORTATION PROGRAMS

A. Capital Outlay Allowance

Example

To determine the capital outlay allowance, divide the actual capital outlay expenditure¹ for school buses (based on bid price) by 5² (cost amortized over a five-year period) which equals the annual capital outlay allowance.³

$$\begin{array}{r} {}^1\$185,321.92 \\ {}^25 \div \\ \hline =^3\$37,064.39 \end{array}$$

B. Operation Allowance

The actual operating expenditure¹ (includes such items as gasoline, tires, oil, lubrication, and insurance) is reimbursable and represents the State allowance for operation.

$${}^1\$12,936.94$$

C. Allowance Drivers' Salaries

The allowance for drivers' salaries is determined according to the following rates:

1. \$7 per day (basic allowance).

Example

2. \$2.33 per hour, additional allowance if driving time exceeds 3-1/2 hours per day.

3. \$3.50 additional allowance for noon runs.

(Rates include half-day sessions even if total time is less than 4-1/2 hours.)

The actual expenditure for salaries, not to exceed the above rates, is reimbursable under the formula and constitutes the State allowance for drivers' salaries.¹

¹\$69,623.97

D. Maintenance Allowance

The actual maintenance cost,¹ not to exceed \$500 per bus, except in unusual and reasonable cases, is reimbursable and represents the State allowance for maintenance.

¹\$13,378.50

To obtain the school district's total State aid allowance for transportation under the Maryland formula, add the

Capital Outlay Allowance	\$37,064.39
Operation Allowance	12,936.94
Allowance Drivers' Salaries	69,623.97
Maintenance Allowance	13,378.50

Total State Transportation
Allowance under Minimum
Program

\$133,003.80

METHOD USED TO DETERMINE THE STATE TRANSPORTATION
AID ALLOCATION FOR PRIVATELY-OPERATED
PUPIL TRANSPORTATION PROGRAMS

In actual practice the State does not use a prescribed formula in allocating State aid funds for privately operated transportation programs. The State Department of Education does however follow certain guidelines (based on actual transportation cost experience) in allocating State transportation aid funds for privately operated programs. If the total annual contract cost does not exceed the amount as determined according to the pattern outlined below, the request for reimbursement is generally approved.

A. Capital Outlay Allowance

Example

To determine the capital

outlay allowance, the actual

capital outlay expenditure¹ ¹\$7,200

(limited by certified manufac-

turer's selling price, minus ÷

10%, plus title tax, sales tax,

and drivers' weight charges) is

divided by 8² to obtain the 28

annual capital outlay allowance.³ = ³\$900.00

This allowance is reimbursable

annually for entire period

vehicle is in operation and can

pass State inspection.

B. Allowance for Interest on
Investment

To determine the interest on
investment, the initial capital

Example

outlay expenditure¹ is multiplied ¹\$7,200
 by 5%² to obtain the annual ².05 ^x
 allowance for interest on invest-
 ment.³ This annual allowance is = ³\$360.00
 reimbursable annually for entire
 period vehicle is in operation
 and can pass State inspection.

C. Allowance for Fixed Charges

Actual annual expenditure for
 fixed charges¹ is allowed ¹\$75
 (includes insurance and
 licenses), not in excess of \$75.

D. Operation Allowance

To determine the allowance for
 operation (includes gasoline,
 oil, lubrication, and anti-
 freeze), deduct from the actual
 total daily mileage¹ any extended ¹48
 mileage² to obtain allowable ²2
 daily mileage.³ (Extended =³46
 mileage is that mileage with or
 without pupils off the regular
 approved route.)

D. Continued--

ExampleACTUAL DAILY BUS MILEAGE

<u>Road surface</u>	<u>Mileage unloaded</u>	<u>Mileage loaded</u>
paved	34	34
	10*	10
gravel	2	2
dirt	<u>2**</u>	<u>0</u>
Total	48	46

*Mileage over road
with a 5% grade.

**Extended mileage.

The total allowable daily mileage is then adjusted by two factors (1) the road surface factor, and (2) the road grade factor to obtain the total adjusted and allowable daily mileage.

1. Apply the road surface factor by multiplying the total allowable daily mileage¹ over gravel or dirt road surfaces by the factor² indicated below opposite appropriate type of road surface over which vehicle travels to obtain the first mileage adjustment.³

<u>Road surface</u>	<u>Factor</u>
paved	1.
gravel	1.7
dirt	2.

ALLOWABLE DAILY BUS MILEAGE

<u>Road surface</u>	<u>mileage</u>	<u>Factor</u>	<u>Adjusted mileage</u>
paved	34	-	34
	10*	-	10
gravel	12	21.7	33.4
dirt	0	-	-
Total Daily Mileage			47.4

*Mileage over road
with a 5% grade.

Example

2. Apply the road grade factor by multiplying the total allowable daily mileage over a specific road grade¹ by the factor² indicated below opposite appropriate type of road grade over which vehicle travels to obtain the second mileage adjustment.³

ALLOWABLE DAILY BUS MILEAGE			
<u>Road surface mileage</u>		<u>Factor</u>	<u>Adjusted mileage</u>
paved	34	-	34
	¹ 10	² 1.38	³ 13.8
gravel	3.4	-	3.4
dirt	-	-	-
Total Daily Mileage			51.2

<u>Percent of grade</u>	<u>Grade factor</u>
1	1.02
2	1.06
3	1.14
4	1.23
5	1.38
6	1.57
7	1.85
8	2.18
9	2.50
10	2.78
11	2.98
12	3.15
13 and over	3.25

In actual practice this factor is applied in only a limited number of situations in State.

D. Continued--

Example

The allowable and adjusted
 daily mileage¹ is then multiplied ¹51.2
 by the number of days school is x
 scheduled to be in session² ²183
 during the school year to obtain
 the total allowable and adjusted
 annual mileage.³ = 39,369.6

To determine the allowance for
 operation, multiply the total
 allowable annual adjusted mileage
 by vehicle capacity factor.

Apply the vehicle capacity
 factor by multiplying the total
 allowable adjusted annual
 mileage¹ by the factor² indicated ¹9,369.6
 below opposite appropriate rated ².0644*
 capacity of vehicle to obtain
 the total operation allowance.³ = ³\$603.39

<u>Vehicle capacity</u>	<u>Factor</u>
72 passenger	.0725
66 passenger	.0697
60 passenger	.0644*
54 passenger	.0599
48 passenger	.0560
42 passenger	.0527

Example

36 passenger	.0498
30 passenger	.0470
24 passenger	.0443
12 passenger	.0389
less than 12 passenger capacity	.0375

E. Allowance Drivers' Salaries

The allowance for drivers' salaries is determined according to the following rates:

1. \$7 per day (basic allowance).
2. \$2.33 per hour, additional allowance if driving time exceeds 3-1/2 hours per day.
3. \$3.50 additional allowance for noon runs.

(Rates include half-day sessions even if total time is less than 4-1/2 hours.)

The actual expenditure for salaries not to exceed above rates, is reimbursable under the formula and constitutes the State allowance for drivers' salaries.¹

¹\$1,281

F. Tire Allowance

To determine the allowance for tires, the daily allowable mileage is first adjusted by two factors:

(1) road surface factor, and (2) tire size factor.

1. Apply the road surface factor by multiplying the total allowable daily mileage¹ over gravel or dirt road surfaces by the factor² indicated below opposite appropriate type of road surface over which vehicle travels to obtain the first mileage adjustment.³

<u>Road surface</u>	<u>Factor</u>
paved	1.
gravel	1.7
dirt	2.

2. The total allowable adjusted daily mileage¹ is then multiplied by the number of days school is scheduled to be in session² during the school year to obtain the total allowable and adjusted annual mileage.³

ExampleALLOWABLE DAILY BUS
MILEAGE

<u>Road surface mileage</u>	<u>Factor</u>	<u>Adjusted mileage</u>
paved 34	-	34
10*	-	10
gravel ¹ 2	² 1.7	³ 3.4
dirt 0	-	-
Total Daily Mileage		47.4

*Mileage over road with a 5% grade.

¹47.4

x

²183

³8,674.2

3. Apply the tire size factor by multiplying the total annual adjusted mileage¹ by the factor² indicated below opposite appropriate tire size to obtain total tire allowance.³

18,674.2

2.0310^x*3\$268.90

<u>Regular</u>	<u>Factor</u>	<u>Tubeless</u>	<u>Factor</u>
660-16	.0090	7-22.5	.0141
650-16	.0110	8-22.5	.0238
700-16	.0120	9-22.5	.0265
750-16	.0135	10-22.5	.0318
600-20	.0150		
650-20	.0173		
700-20	.0192		
750-20	.0232		
825-20	.0258		
900-20	.0310*		

G. Maintenance Allowance

To determine the maintenance allowance, first obtain the total adjusted annual mileage by applying two factors: (1) the road surface factor, and (2) the road grade factor to obtain the total adjusted annual mileage.

1. Apply the road surface factor by multiplying the total allowable daily mileage¹ over gravel or dirt road surfaces by the factor² indicated below opposite appropriate type of road surface over which vehicle travels to obtain the first mileage adjustment.³

<u>Road surface</u>	<u>Factor</u>
paved	1.
gravel	1.7
dirt	2.

2. Apply the road grade factor by multiplying the total allowable daily mileage over a specific road grade¹ by the factor² indicated below opposite appropriate type of road grade over which vehicle travels to obtain the second mileage adjustments.³

<u>Percent of grade</u>	<u>Grade factor</u>
1	1.02
2	1.06
3	1.14
4	1.23
5	1.38
6	1.57

ALLOWABLE DAILY BUS MILEAGE

<u>Road surface mileage</u>	<u>Factor</u>	<u>Adjusted mileage</u>
paved 34	-	34
10*	-	10
gravel 12	21.7	33.4
dirt 0	-	-
Total Daily Mileage		47.4

*Mileage over road with a 5% grade.

ALLOWABLE DAILY BUS MILEAGE

<u>Road surface mileage</u>	<u>Factor</u>	<u>Adjusted mileage</u>
paved 34	-	34
110	21.38	313.8
gravel 3.4	-	3.4
dirt -	-	-
Total Daily Mileage		51.2

Example

<u>Percent of grade</u>	<u>Grade factor</u>
7	1.85
8	2.18
9	2.50
10	2.78
11	2.98
12	3.15
13 and over	3.25

The allowable and adjusted daily mileage¹ is then multiplied by the number of days school is scheduled to be in session² to obtain the total allowable and adjusted annual mileage.³

	¹ 51.2
	x
	² 183
	= ³ 9,369.6

To determine the allowance
for maintenance, multiply the
total annual allowable adjusted
mileage¹ by the vehicle age
factor² indicated below opposite
appropriate age of vehicle
classification to obtain the
total maintenance allowance.³

19,369.6
^x
2.0300*

= \$281.08

*Computed on basis of data on following page.

Example

If age of vehicle is:

VEHICLES OF LESS THAN

BODIES .0175

Capital Outlay Allowance	\$900.00
--------------------------	----------

Allowance for Fixed Charges	75.00
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Operation Allowance	603.39
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Allowance Drivers' Salaries	1,281.00
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Tire Allowance	268.90
-----------------------	---------------

Maintenance Allowance	281.08
-----------------------	--------

\$3,770.37

METHOD USED TO DETERMINE THE STATE TRANSPORTATION
AID ALLOCATION FOR PUPILS TRANSPORTED
BY PRIVATE CAR

In actual practice the State does not use a prescribed formula in allocating State aid funds for pupils transported by private car. The State Department of Education does however follow certain guidelines in allocating State aid funds for this type of transportation. In general, if the total cost of such transportation does not exceed \$2 per day plus \$.07 per mile, the request for reimbursement would generally be allowed and is reimbursable.

APPENDIX B

**COVER MEMORANDUM AND CIRCULAR NO. 458, USED
IN COLLECTING DATA ON THE CHARACTERISTICS
OF STATE PLANS FOR FINANCING
PUPIL TRANSPORTATION**

MEMORANDUM

July 24, 1962

TO: State Supervisors and Directors of Pupil Transportation

FROM: John B. Murray

SUBJECT: Revision of Circular No. 458, Characteristics of State Plans for Financing Pupil Transportation, and completion of attached inquiry form concerning criteria for evaluating State plans for financing pupil transportation.

We are planning to update Circular No. 458, Characteristics of State Plans for Financing Pupil Transportation, 1958. We are enclosing a copy of this circular with the provisions for your State marked in red. If there have been no changes in the provisions as listed for your State, we would appreciate it if you would mark OK, initial, and return the circular to us. If the information is not correct, please make any necessary corrections. We would like to have any printed leaflet or bulletin in which the new provisions or regulations are stated or a citation of the section of law where we may find them.

In addition to Circular No. 458, we are enclosing two inquiry forms entitled An Inquiry Concerning the Acceptability of Certain Selected Criteria for Evaluating State Plans for Financing Pupil Transportation. We would appreciate your completing one inquiry form for us and returning it with your corrected copy of Circular No. 458. There is a great deal of interest at the present time in this area of State programs for financing pupil transportation, and your assistance will enable us to bring this material up to date as soon as possible so that it will be of maximum usefulness to the field.

We are enclosing copies of Circular No. OE20035 (1962 rev.), State School Bus Standards and our new mailing list of State directors of pupil transportation. Your prompt assistance several months ago in providing information for these revisions is greatly appreciated. A limited number of additional copies is available if you have need for them.

Enclosures 7

STATE	Basis for allocating State funds													Requirements to qualify for State funds for transportation			
	Yes	No	Flat grant	Flat % of cost	Approved actual or average expenditure	Formula	Number of pupils	Number of buses	Density of transportation	Road conditions	Road depreciation	Other	Distance—Elementary	Distance—Secondary	Other requirements		
1	2	3	4	5	6	7	8	9	10	11	12	13	14	15	16	17	18
Alabama	I	-	-	-	-	I	A.D.A.	-	-	I	-	I	Cost experience.	2	2	2	Must be in approved vehicles.
Arizona	-	I	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-
Arkansas	-	I	-	-	-	I	A.D.A.	I	-	I	-	I	-	2	2	2	Certain reports must be filed, must be in approved buses.
California	-	I	-	5/3	5/	5/	-	-	-	-	-	-	-	5/4, 5/5, 1, 4-8	5, 15-34	-	-
Colorado	-	I	-	-	-	-	A.D.A.	-	I	-	-	-	-	1	1	1	Histritz must have spent proceeds of a minimum levy for transportation.
Connecticut	-	I	-	5/	-	-	A.D.A. and Rev.	-	-	-	-	-	-	None	None	-	-
Delaware	-	I	-	-	I	-	A.D.A.	-	-	-	-	I	Negotiation on publicly owned buses.	1	2	2	Pupil must be provided seat. Bus and driver must meet standards.
Florida	I	-	-	-	-	-	A.D.A.	-	-	-	-	I	Area served.	2	2	2	False reports on students suspends allocation.
Georgia	I	-	-	-	-	I	A.D.A.	-	-	I	-	-	Cost experience.	1 1/2	1 1/2	-	-
Iaho	I	-	-	I	-	-	A.D.T.	-	-	-	-	-	I	1 1/2	1 1/2	-	Program must be approved by local or county board.
Illinois	-	I	-	I	-	I	A.D.A.	-	-	I	-	I	-	1 1/2	1 1/2	-	Must meet standards for buses, drivers, and operating procedures.
Indiana	I	-	-	-	-	I	I	-	-	I	-	I	Pupils per bus mile.	over 1 1/2	over 1 1/2	-	1937 Legislature fixes per pupil distribution in average for 1935-36 and 1936-37 school years.
Iowa	-	I	-	-	-	I	A.D.T.	-	I	-	-	I	-	1 or 2	1 or 5	-	Must comply with all legal requirements and with all regulations of the State Department of Public Instruction.
Kansas	I	-	I	-	-	-	Rev. J/	-	-	-	-	-	-	2 1/2	-	-	-
Kentucky	I	-	-	-	-	I	A.D.A.	-	-	-	-	I	Area served.	1	1	-	-
Louisiana	I	-	-	-	-	-	A.D.A.	-	I	-	-	-	Length of bus.	1	1	-	-
Maine	-	I	-	5/	-	-	-	-	-	-	-	-	-	None	None	-	Left to discretion of local board - simply pay percent of cost.
Maryland	I	-	-	-	I	I	-	-	I	-	I	I	Interest on bus cost. Drivers salary. Fixed costs. Operating costs. Maintenance costs.	None	None	-	-
Massachusetts	-	I	-	-	5/	-	Rev. A.S.	-	-	-	-	-	Cost, less \$5 per year per pupil in net average membership.	1 1/2	1 1/2	-	-
Michigan	I	-	-	-	I	I	-	-	-	-	-	-	-	1 1/2	1 1/2	-	Transportation must be on approved routes. Cost cannot exceed \$50 per pupil. Pupils must live outside village or city limits.
Minnesota	-	I	-	10 or more cases	-	-	A.D.T.	-	-	-	-	I	-	1	1	-	Must meet standards for buses and drivers and observe operating regulations.
Mississippi	I	-	-	-	-	I	A.D.A.	-	-	I	I	I	-	1	1	-	Must meet standards for buses and drivers. Must submit plans and proposals for operation of buses.

STATE	Basis for allocating State funds													Requirements to qualify for State funds for transportation			
	Yes	No	Flat grant	Flat % of cost	Approved actual or average expenditure	Formula	Number of pupils	Number of buses	Density of transportation	Road conditions	Road depreciation	Other	Distance—Elementary	Distance—Secondary	Other requirements		
1	2	3	4	5	6	7	8	9	10	11	12	13	14	15	16	17	18
Missouri	I	-	-	-	-	I	A.D.A.	-	-	-	-	-	Number of pupils per mile of bus route.	1	1	1	Must meet requirements for vehicles, drivers, and routes.
Montana	-	I	-	I	-	I	I	I	I	-	-	-	One formula for buses. One formula for individual facilities.	5	5	5	Must meet standards for buses and drivers.
Nebraska	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-
Nevada	-	I	-	I	-	-	-	-	-	-	-	-	Based on elements of cost of program such as salaries, gas, oil, etc., but excluding cost of new buses.	None	None	-	Must comply with all legal requirements and with all regulations of the State Department of Education.
New Hampshire	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-
New Jersey	-	I	-	I	-	-	-	-	I	-	-	-	Include cost of new buses.	2	2 1/2	2 1/2	Cost and method must be approved by county superintendent of schools.
New Mexico	-	I	-	-	-	I	Rev. X	-	-	-	I	I	Miles of route.	1 1/2	1 1/2	1 1/2	Must approve driver, vehicle, route, and transportation contract.
New York	-	I	-	-	5/	-	-	-	I	-	-	I	Formula based on elements of cost of program such as quantity of buses, salaries, gas and oil, etc.	1 1/2	1 1/2	1 1/2	Must approve vehicle, routes, costs, and contracts.
North Carolina	-	I	-	-	I	-	-	-	-	-	-	-	-	1 1/2	1 1/2	-	State approval of routes, maintenance, etc.
North Dakota	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-
Ohio	I	-	-	-	If less than formula	I	Rev. X	-	I	-	I	-	-	1	1	-	Must be in approved vehicles.
Oklahoma	I	-	-	-	-	I	I	-	-	I	-	-	Cost experience used in correction figure.	1 1/2	1 1/2	-	Must be on approved routes. Pupils must live outside city limits.
Oregon	-	I	-	I	-	I	-	-	-	-	-	I	20 per pupil mile.	1	1	-	Must be in approved vehicles.
Pennsylvania	I	-	-	-	5/	-	-	-	-	-	-	I	-	1 1/2 or 2 or more	1 1/2 or more	-	Department of Public Instruction must approve same and contracts for providing. Must meet State standards on vehicle and operation.
Rhode Island	I	I	-	5/	-	-	-	-	-	-	-	-	-	None	None	-	For transporting high school pupils outside of town (special transportation grant) or for elementary or secondary within town if they are not entitled to equalization aid.
South Carolina	-	I	-	-	I	-	-	-	-	-	-	-	-	1 1/2	1 1/2	-	-
South Dakota	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-
Tennessee	I	-	-	For some	-	I	A.D.A.	-	-	I	-	I	-	1 1/2	1 1/2	-	County boards of education are required to meet certain standards for school bus equipment, qualifications of drivers and other State laws and State Board regulations to qualify for transportation funds.
Texas	I	-	-	-	-	I	I	I	I	-	I	-	Included in bus allowance.	2	2	-	Follow regular review. Pupils in cities must live at least 1/2 mile from city public transportation system.
Utah	I	-	-	-	-	I	I	I	I	I	-	I	-	1 1/2	2	-	Over routes approved by the State Board of Education.

State	Year of classification	Data for allocating State funds					Factors in State formula for allocating transportation funds			Requirements to qualify for State funds for transportation		
		Per pupil	Per pupil	Per pupil	Per pupil	Per pupil	Per pupil	Per pupil	Per pupil	Other	Other	Other
1.	1	2	3	4	5	6	7	8	9	10	11	12
Tennessee	-	-	-	-	-	-	X	-	X	-	-	-
Virginia	-	-	-	-	-	-	X	-	-	-	-	-
Washington	-	-	-	-	-	-	X	-	-	-	-	-
West Virginia	X	-	-	-	-	-	X	-	-	-	-	-
Wisconsin	-	X	X	-	-	X	X	-	-	-	-	-
Wyoming	X	-	-	-	-	-	-	-	-	-	-	-

1/ Includes only a by-laws or regulations.
2/ Does not include transportation costs or payments.
3/ Includes only a by-laws or regulations.
4/ Includes only a by-laws or regulations.
5/ Includes only a by-laws or regulations.

6/ State local contributions.
7/ Includes only a by-laws or regulations.
8/ Includes only a by-laws or regulations.
9/ Includes only a by-laws or regulations.
10/ Includes only a by-laws or regulations.

U. S. DEPARTMENT OF
HEALTH, EDUCATION, AND WELFARE
Office of Education

CIRCULAR NO. 458
(Revised)
Washington 25, D. C.
November 1958

Characteristics of State Plans for Financing Pupil Transportation
By E. Glenn Featherston, Director
Division of State and Local School Systems

Forty-two States now provide money for assistance in paying the cost of pupil transportation. In some of the remaining 6 States, funds from the State may be used in paying for this service, but a local unit does not qualify for any more State funds if it transports pupils than if it does not. The following table indicates in brief the chief characteristics of State plans for allocating transportation funds to local administrative units. Amounts of transportation funds allocated in the States were not included in this table, partly because this information is not computed in some States and partly because the information which is available has been included in other Office of Education publications.

The 42 States are almost evenly divided on whether or not they include transportation allocations in a total foundation program to which the State contributes. In 19 States the allocation is made within the foundation program, in 21 it is not, and in 2 States it is made both ways. The trend toward placing the financing of transportation within a foundation program has been relatively slow during the last years.

Twenty-six States use some sort of a formula for computing the transportation need of a local district although in a few of these the formula is used only to set a ceiling for the cost on which the State will reimburse. In the remaining States the State contribution is based on cost or on a share of the cost. However, all formulae are designed to measure justifiable costs and in several of the formula the cost is a direct factor. Other factors commonly used in State formulae are number of buses, number of bus miles, density of transported population, road conditions, and bus depreciation. Bus depreciation probably enters into the cost computation in several of the States where this factor is not checked. In most States the total transportation load is measured in number of pupils transported although in a few States reimbursement is related only to cost of the service.

Of the 42 States which provide funds for transportation, 36 set up a distance limit for eligibility of pupils for the service at State expense. In the other 6 the State participates in paying the cost on any transportation the local board of education considers necessary. In most of the 36 States local districts may transport pupils within these limits but wholly at local expense.

CIRCULAR:
(Revised)
Washington, D.C.
November 1958

Transportation
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APPENDIX C

**INQUIRY FORM AND RESPONSE TABULATION TABLES, USED
IN COLLECTING AND TABULATING DATA ON THE STATUS
OF CERTAIN SELECTED CRITERIA FOR EVALUATING
STATE PLANS FOR FINANCING PUPIL
TRANSPORTATION**

AN INQUIRY CONCERNING THE ACCEPTABILITY OF CERTAIN SELECTED CRITERIA
FOR EVALUATING STATE PLANS¹ FOR FINANCING PUPIL TRANSPORTATION

Person Reporting:

(Name) _____ (Title) _____ (Date)

General Information

1. Enclosed please find two copies of inquiry form. One copy is for your files and the other copy is to be completed and returned with your corrected copy of Circular No. 458 Characteristics of State Plans for Financing Pupil Transportation, 1958.
2. This inquiry form will be more easily understood and answered if it is read through completely before any questions are answered.
3. Please attach any additional material or explanatory statements which you feel will aid in the interpretation of any of the data reported.

Directions for Completing:

4. Section I, Table 1

Please indicate in column 2, 3 or 4 whether or not the criteria listed in column 1 constitutes, in your opinion, an important consideration that should be recognized in any State plan for financing pupil transportation.

In column 5, 6 or 7 please indicate if your State plan for financing pupil transportation recognizes the criteria listed in column 1 and the means by which this is accomplished.

5. Section II, Tables 1 and 2

After careful study of all the criteria listed in Section I, please indicate in Section II, Tables 1 and 2, any criteria which, in your opinion, should be added to this list, dropped, or modified.

¹The term State plan as defined for our purposes includes all statutes, the State aid formula and administrative rules and regulations, as may pertain to the financing of pupil transportation within a given State.

Section II
Table I

Recommended Deletions and Modifications

Please indicate below any of the previously listed 12 criteria which should, in your opinion, be either deleted or modified and your reasons for recommending these changes, and whether or not your State plan recognizes this criterion.
(Please attach any additional material or explanatory statements which you feel will aid in the interpretation of any of the data reported.)

Criteria	If your State plan for financing pupil transportation recognizes these criteria, please indicate the means by which this is accomplished.			
	Statute and/or State aid formula	Administrative rules and regulations (including standards)	Recommended practices encouraged through State leadership activities	
1	2	3	4	
	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	
	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	
	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	
	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	
	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	

Section II
Table 2

Recommended Additions

Please indicate below any additional criteria which should, in your opinion, be added to the list, your reasons for recommending the additions, and whether or not your State plan recognizes these additional criteria.

(Please attach any additional material or explanatory statements which you feel will aid in the interpretation of any of the data reported.)

Criteria	If your State plan for financing pupil transportation recognizes these criteria, please indicate the means by which this is accomplished.			
	Statute and/or State aid formula	Administrative rules and regulations (including leadership standards)	Recommended practices encouraged through State leadership activities	
1	2	3	4	
	◇	◇	◇	
	◇	◇	◇	

TABLE A.--Acceptability and recognition of criterion number 1 in State plans for financing pupil transportation by State, 1963

State	Criterion number 1.--A State plan should provide sufficient State funds to enable local units with reasonable local effort to operate safe, economical, and efficient systems of transportation for all pupils who should be transported.					
	Acceptability of the criterion by State directors of pupil transportation			Means by which criterion is currently recognized in State plans for financing pupil transportation		
	Acceptable	Acceptable in part	Not acceptable	Statute and/or State aid formula	Administrative rules and regulations (including standards)	Recommended practices encouraged through State leadership activities
1	2	3	4	5	6	7
Alabama	X	-	-	X	-	-
Alaska	X	-	-	-	X	-
Arizona 1,2/	-	-	-	-	-	-
Arkansas	X	-	-	-	X	-
California	X	-	-	X	X	X
Colorado 1/	-	-	-	-	-	-
Connecticut	-	X	-	X	-	X
Delaware	X	-	-	-	-	X
Florida	X	-	-	X	-	-
Georgia	X	-	-	X	-	-
Hawaii 2/	X	-	-	-	-	-
Idaho	X	-	-	X	X	-
Illinois	-	X	-	X	-	-
Indiana	X	-	-	X	-	X
Iowa	X	-	-	X	-	-
Kansas	X	-	-	2/X	-	-
Kentucky	X	-	-	X	X	X
Louisiana	X	-	-	X	-	-
Maine	X	-	-	X	-	-
Maryland	X	-	-	X	-	-
Massachusetts	X	-	-	X	-	-
Michigan	X	-	-	X	X	X
Minnesota	X	-	-	X	X	-
Mississippi	X	-	-	X	X	-
Missouri	X	-	-	-	X	-
Montana	X	-	-	X	-	-
Nebraska 2/	X	-	-	-	-	-
Nevada	X	-	-	X	X	-
New Hampshire 2/	X	-	-	-	-	-
New Jersey	X	-	-	X	-	-
New Mexico	X	-	-	X	-	-
New York	X	-	-	X	X	X
North Carolina	X	-	-	X	-	-
North Dakota	X	-	-	X	-	-
Ohio	X	-	-	X	X	X
Oklahoma	-	X	-	X	-	-
Oregon	X	-	-	X	-	-
Pennsylvania	X	-	-	X	-	-
Rhode Island	X	-	-	X	X	-
South Carolina 1,4/.	-	-	-	-	-	-
South Dakota 2/	X	-	-	-	-	-
Tennessee	X	-	-	X	-	-
Texas	X	-	-	X	-	-
Utah	X	-	-	X	-	-
Vermont 2/	X	-	-	-	-	-
Virginia	X	-	-	X	X	-
Washington	X	-	-	X	-	-
West Virginia	X	-	-	X	X	X
Wisconsin	X	-	-	X	-	-
Wyoming	-	5/X	-	X	-	-

1/No data reported.

2/No State aid for transportation allocated.

3/To some degree.

4/Entire cost of transportation program borne by State.

5/To public schools only.

TABLE B.--Acceptability and recognition of criterion number 2 in State plans for financing pupil transportation by State, 1963

State	Criterion number 2.--A State plan should tend to compensate for the additional financial burden that falls upon school districts which must provide pupil transportation.					
	Acceptability of the criterion by State directors of pupil transportation			Means by which criterion is currently recognized in State plans for financing pupil transportation		
	Acceptable	Acceptable in part	Not acceptable	Statute and/or State aid formula	Administrative rules and regulations (including standards)	Recommended practices encouraged through State leadership activities
1	2	3	4	5	6	7
Alabama	-	-	X	-	-	-
Alaska	X	-	-	X	-	-
Arizona 1/,2/	-	-	-	-	-	-
Arkansas	X	-	-	-	X	-
California	-	X	-	X	X	X
Colorado 1/	-	-	-	-	-	-
Connecticut	-	X	-	X	-	X
Delaware	X	-	-	-	-	X
Florida	X	-	-	X	-	-
Georgia	X	-	-	X	-	-
Hawaii 2/	X	-	-	-	-	-
Idaho	X	-	-	X	X	-
Illinois	X	-	-	X	-	-
Indiana	X	-	-	X	-	X
Iowa	X	-	-	X	-	-
Kansas	-	X	-	X	-	-
Kentucky	X	-	-	X	X	-
Louisiana	X	-	-	X	-	-
Maine	X	-	-	X	-	-
Maryland	X	-	-	X	-	-
Massachusetts	X	-	-	X	-	-
Michigan	X	-	-	X	X	X
Minnesota	X	-	-	-	-	X
Mississippi	-	-	X	-	-	-
Missouri	X	-	-	-	X	-
Montana	X	-	-	X	-	-
Nebraska 2/	X	-	-	-	-	-
Nevada	X	-	-	-	X	-
New Hampshire 2/	X	-	-	-	-	-
New Jersey	X	-	-	X	-	-
New Mexico	X	-	-	-	X	-
New York	X	-	-	X	X	X
North Carolina	X	-	-	X	-	-
North Dakota	X	-	-	X	-	-
Ohio	X	-	-	X	X	X
Oklahoma	X	-	-	X	-	-
Oregon 1/	-	-	-	-	-	-
Pennsylvania	X	-	-	X	-	-
Rhode Island	-	X	-	X	X	-
South Carolina 1/,3/	-	-	-	-	-	-
South Dakota 2/	-	X	-	-	-	-
Tennessee	X	-	-	X	-	-
Texas	-	X	-	X	-	-
Utah	X	-	-	X	-	-
Vermont 2/	-	X	-	-	-	-
Virginia	X	-	-	X	X	-
Washington	X	-	-	-	-	X
West Virginia	X	-	-	X	-	-
Wisconsin	X	-	-	X	-	-
Wyoming	X	-	-	-	-	-

1/No data reported.

2/No State aid for transportation allocated.

3/Entire cost of transportation program borne by State.

TABLE C.--Acceptability and recognition of criterion number 3 in State plans for financing pupil transportation by State, 1963

State	Criterion number 3.--A State plan should take into account provisions for capital outlay expenditures, such as the purchase of school buses, bus equipment, and the erection of bus shops.					
	Acceptability of the criterion by State directors of pupil transportation			Means by which criterion is currently recognized in State plans for financing pupil transportation		
	Acceptable	Acceptable in part	Not acceptable	Statute and/or State aid formula	Administrative rules and regulations (including standards)	Recommended practices encouraged through State leadership activities
1	2	3	4	5	6	7
Alabama	X	-	-	X	-	-
Alaska	-	X	-	X	-	-
Arizona 1,2/	-	-	-	-	-	-
Arkansas	X	-	-	-	X	-
California	-	X	-	X	X	X
Colorado 1/	-	-	-	-	-	-
Connecticut	-	X	-	-	X	X
Delaware	-	X	-	-	-	-
Florida	-	X	-	-	-	-
Georgia	X	-	-	3/X	-	4/X
Hawaii 2/	X	-	-	-	-	-
Idaho	X	-	-	X	X	-
Illinois	-	X	-	X	-	-
Indiana	X	-	-	-	-	X
Iowa	-	-	X	-	-	-
Kansas	X	-	-	-	-	-
Kentucky	X	-	-	X	X	X
Louisiana	X	-	-	-	-	X
Maine	X	-	-	X	-	-
Maryland	X	-	-	X	-	-
Massachusetts	X	-	-	5/X	6/X	-
Michigan	X	-	-	-	X	X
Minnesota	-	7/X	-	-	-	X
Mississippi	X	-	-	X	X	-
Missouri	-	-	X	-	-	-
Montana	-	-	X	-	-	-
Nebraska 2/	X	-	-	-	-	-
Nevada	-	-	X	-	-	-
New Hampshire 2/	X	-	-	-	-	-
New Jersey	X	-	-	X	-	-
New Mexico	X	-	-	X	-	-
New York	X	-	-	X	X	X
North Carolina	-	5/X	-	X	-	-
North Dakota	-	-	X	-	-	-
Ohio	X	-	-	X	-	-
Oklahoma	X	-	-	X	-	-
Oregon	X	-	-	X	-	-
Pennsylvania	X	-	-	X	-	-
Rhode Island	X	-	-	X	X	-
South Carolina 1/,8/	-	-	-	-	-	-
South Dakota 2/	-	X	-	-	-	-
Tennessee	X	-	-	X	-	-
Texas	X	-	-	X	-	-
Utah	X	-	-	-	-	X
Vermont 2/	-	X	-	-	-	-
Virginia	-	-	X	-	-	-
Washington	X	-	-	X	X	-
West Virginia	-	X	-	X	-	-
Wisconsin	X	-	-	-	-	X
Wyoming	X	-	-	X	-	-

1/No data reported.

2/No State aid for transportation allocated.

3/School buses only.

4/Shop and equipment.

5/Buses and equipment only.

6/Only in certain cases.

7/If equipment is district owned and operated.

8/Entire cost of transportation program borne by State.

TABLE 1. - *Continued*

1. Name of the vessel

2. Date of departure

3. Date of arrival

4. Name of the master

5. Name of the owner

6. Name of the agent

7. Name of the consignee

8. Name of the cargo

9. Name of the destination

10. Name of the port of origin

11. Name of the port of destination

12. Name of the port of call

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TABLE D.--Acceptability and recognition of criterion number 4 in State plans for financing pupil transportation by State, 1963

State	Criterion number 4.--A State plan should provide for the amortization of capital outlay expenditures for school buses and school bus garages beyond the current year.					
	Acceptability of the criterion by State directors of pupil transportation			Means by which criterion is currently recognized in State plans for financing pupil transportation		
	Acceptable	Acceptable in part	Not acceptable	Statute and/or State aid formula	Administrative rules and regulations (including standards)	Recommended practices encouraged through State leadership activities
1	2	3	4	5	6	7
Alabama	-	-	X	-	-	-
Alaska	-	X	-	X	-	-
Arizona 1/,2/	-	-	-	-	-	-
Arkansas	-	-	X	-	-	-
California	-	X	-	X	X	X
Colorado 1/	-	-	-	-	-	-
Connecticut	-	X	-	-	X	X
Delaware	-	X	-	-	-	-
Florida	X	-	-	-	X	-
Georgia	X	-	-	X	-	-
Hawaii 2/	X	-	-	-	-	-
Idaho	X	-	-	X	X	-
Illinois	X	-	-	X	-	-
Indiana	X	-	-	-	-	X
Iowa	-	-	X	-	-	-
Kansas	-	X	-	-	-	-
Kentucky	X	-	-	-	-	-
Louisiana	X	-	-	-	-	X
Maine	X	-	-	X	-	-
Maryland	X	-	-	X	-	-
Massachusetts	X	-	-	3/X	X	-
Michigan	X	-	-	-	X	X
Minnesota	X	-	-	-	-	X
Mississippi	X	-	-	X	X	-
Missouri	-	-	X	-	-	-
Montana	X	-	-	X	-	-
Nebraska 2/	4/X	-	-	-	-	-
Nevada	-	-	X	-	-	-
New Hampshire 2/	X	-	-	-	-	-
New Jersey	X	-	-	X	-	-
New Mexico	X	-	-	X	-	-
New York	X	-	-	X	X	X
North Carolina	X	-	-	X	-	-
North Dakota	-	-	X	-	-	-
Ohio	X	-	-	X	-	-
Oklahoma	-	X	-	-	-	-
Oregon	X	-	-	X	-	-
Pennsylvania	-	-	X	-	X	-
Rhode Island	X	-	-	X	X	-
South Carolina 1/,5/	-	-	-	-	-	-
South Dakota 2/	-	X	-	-	-	-
Tennessee	X	-	-	X	-	-
Texas	X	-	-	X	-	-
Utah	-	X	-	-	-	-
Vermont 2/	-	X	-	-	-	-
Virginia	-	-	X	-	-	-
Washington	X	-	-	-	X	-
West Virginia	X	-	-	X	X	-
Wisconsin	X	-	-	-	X	-
Wyoming	X	-	-	-	-	-

1/No data reported.

4/Not beyond current year.

2/No State aid for transportation allocated.

5/Entire cost of transportation program borne by State.

3/Buses only.

TABLE E.--Acceptability and recognition of criterion number 5 in State plans for financing pupil transportation by State, 1963

State	Criterion number 5.--A State plan should tend to stimulate the attainment of desirable standards in school bus equipment, maintenance operation, and the employment of personnel.					
	Acceptability of the criterion by State directors of pupil transportation			Means by which criterion is currently recognized in State plans for financing pupil transportation		
	Acceptable	Acceptable in part	Not acceptable	Statute and/or State aid formula	Administrative rules and regulations (including standards)	Recommended practices encouraged through State leadership activities
1	2	3	4	5	6	7
Alabama	X	-	-	-	-	X
Alaska	X	-	-	-	X	-
Arizona 1,2/	-	-	-	-	-	-
Arkansas	X	-	-	-	X	X
California	X	-	-	-	-	X
Colorado 1/	-	-	-	-	-	-
Connecticut	X	-	-	X	X	X
Delaware	X	-	-	-	X	-
Florida	X	-	-	-	-	X
Georgia	X	-	-	X	X	-
Hawaii 2/	X	-	-	-	-	-
Idaho	X	-	-	X	X	-
Illinois	-	X	-	-	X	-
Indiana	X	-	-	-	-	X
Iowa	X	-	-	X	X	-
Kansas	X	-	-	X	-	-
Kentucky	X	-	-	-	X	X
Louisiana	X	-	-	X	-	X
Maine	X	-	-	-	-	X
Maryland	X	-	-	-	X	-
Massachusetts	X	-	-	-	-	X
Michigan	X	-	-	X	-	X
Minnesota	X	-	-	-	X	X
Mississippi	X	-	-	X	X	-
Missouri	X	-	-	X	-	-
Montana	X	-	-	X	X	-
Nebraska 2/	X	-	-	-	-	-
Nevada	X	-	-	X	X	X
New Hampshire 2/	X	-	-	-	-	-
New Jersey	X	-	-	X	-	X
New Mexico	X	-	-	-	X	-
New York	X	-	-	X	X	X
North Carolina	X	-	-	-	X	-
North Dakota	X	-	-	-	X	-
Ohio	X	-	-	X	X	X
Oklahoma	X	-	-	X	-	-
Oregon	X	-	-	X	X	-
Pennsylvania	X	-	-	-	X	-
Rhode Island	X	-	-	X	X	-
South Carolina 1,3/	-	-	-	-	-	-
South Dakota 2/	X	-	-	-	-	-
Tennessee	-	X	-	-	X	-
Texas	X	-	-	-	X	X
Utah	X	-	-	-	X	-
Vermont 2/	X	-	-	X	-	-
Virginia	X	-	-	X	X	-
Washington	X	-	-	-	X	X
West Virginia	X	-	-	X	X	X
Wisconsin	X	-	-	-	X	-
Wyoming	X	-	-	X	-	-

1/No data reported.

2/No State aid for transportation allocated.

3/Entire cost of transportation program borne by State.

NOTE: The following information is for informational purposes only and should not be used for any other purpose.

Information on the company's financial performance and position						Notes
Information on the company's financial performance and position						
Item	Amount	Amount	Amount	Amount	Amount	
1	2	3	4	5	6	
1	2	3	4	5	6	1990
1	2	3	4	5	6	1991
1	2	3	4	5	6	1992
1	2	3	4	5	6	1993
1	2	3	4	5	6	1994
1	2	3	4	5	6	1995
1	2	3	4	5	6	1996
1	2	3	4	5	6	1997
1	2	3	4	5	6	1998
1	2	3	4	5	6	1999
1	2	3	4	5	6	2000
1	2	3	4	5	6	2001
1	2	3	4	5	6	2002
1	2	3	4	5	6	2003
1	2	3	4	5	6	2004
1	2	3	4	5	6	2005
1	2	3	4	5	6	2006
1	2	3	4	5	6	2007
1	2	3	4	5	6	2008
1	2	3	4	5	6	2009
1	2	3	4	5	6	2010
1	2	3	4	5	6	2011
1	2	3	4	5	6	2012
1	2	3	4	5	6	2013
1	2	3	4	5	6	2014
1	2	3	4	5	6	2015
1	2	3	4	5	6	2016
1	2	3	4	5	6	2017
1	2	3	4	5	6	2018
1	2	3	4	5	6	2019
1	2	3	4	5	6	2020
1	2	3	4	5	6	2021
1	2	3	4	5	6	2022
1	2	3	4	5	6	2023
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1	2	3	4	5	6	2098
1	2	3	4	5	6	2099
1	2	3	4	5	6	2100

TABLE F.--Acceptability and recognition of criterion number 6 in State plans for financing pupil transportation by State, 1963

State	Criterion number 6.--A State plan should permit at the local level ready flexibility in making adjustments in the transportation program, such as in case of consolidation and fires.					
	Acceptability of the criterion by State directors of pupil transportation			Means by which criterion is currently recognized in State plans for financing pupil transportation		
	Acceptable	Acceptable in part	Not acceptable	Statute and/or State aid formula	Administrative rules and regulations (including standards)	Recommended practices encouraged through State leadership activities
1	2	3	4	5	6	7
Alabama	X	-	-	-	-	X
Alaska	X	-	-	-	X	-
Arizona 1,2/	-	-	-	-	-	-
Arkansas	X	-	-	-	X	-
California	-	X	-	X	X	X
Colorado 1/	-	-	-	-	-	-
Connecticut	-	X	-	X	-	-
Delaware	X	-	-	-	-	X
Florida	X	-	-	X	-	-
Georgia	X	-	-	-	X	-
Hawaii 2/	X	-	-	-	-	-
Idaho	X	-	-	X	X	-
Illinois	-	X	-	X	-	-
Indiana	X	-	-	-	-	X
Iowa	X	-	-	-	X	-
Kansas	X	-	-	-	-	-
Kentucky	X	-	-	-	X	X
Louisiana	X	-	-	-	-	X
Maine	X	-	-	-	-	X
Maryland	X	-	-	-	-	X
Massachusetts	X	-	-	X	-	-
Michigan	X	-	-	X	-	-
Minnesota	X	-	-	-	X	X
Mississippi	X	-	-	-	-	-
Missouri	X	-	-	X	-	-
Montana	X	-	-	-	-	-
Nebraska 1,2/	-	-	-	-	X	-
Nevada	X	-	-	-	X	X
New Hampshire 2/	X	-	-	-	-	-
New Jersey	X	-	-	X	X	-
New Mexico	X	-	-	-	X	-
New York	X	-	-	X	X	X
North Carolina	X	-	-	-	X	-
North Dakota	-	-	X	-	-	-
Ohio	X	-	-	X	-	-
Oklahoma	X	-	-	X	-	-
Oregon	X	-	-	X	-	X
Pennsylvania	X	-	-	-	X	-
Rhode Island	X	-	-	X	X	-
South Carolina 1,3/	-	-	-	-	-	-
South Dakota 2/	X	-	-	-	-	-
Tennessee	X	-	-	X	-	-
Texas	X	-	-	X	-	-
Utah	X	-	-	-	-	X
Vermont 2/	X	-	-	-	-	-
Virginia	h/	h/	h/	X	X	-
Washington	X	-	-	-	X	X
West Virginia	X	-	-	-	X	-
Wisconsin	X	-	-	X	-	-
Wyoming	X	-	-	-	X	-

1/No data reported.

2/No State aid for transportation allocated.

3/Entire cost of transportation program borne by State.

h/No opinion expressed.

State

1	2	3	4	5	6	7	8	9	10	11	12	13	14	15	16	17	18	19	20	21	22	23	24	25	26	27	28	29	30	31	32	33	34	35	36	37	38	39	40	41	42	43	44	45	46	47	48	49	50	51	52	53	54	55	56	57	58	59	60	61	62	63	64	65	66	67	68	69	70	71	72	73	74	75	76	77	78	79	80	81	82	83	84	85	86	87	88	89	90	91	92	93	94	95	96	97	98	99	100	101	102	103	104	105	106	107	108	109	110	111	112	113	114	115	116	117	118	119	120	121	122	123	124	125	126	127	128	129	130	131	132	133	134	135	136	137	138	139	140	141	142	143	144	145	146	147	148	149	150	151	152	153	154	155	156	157	158	159	160	161	162	163	164	165	166	167	168	169	170	171	172	173	174	175	176	177	178	179	180	181	182	183	184	185	186	187	188	189	190	191	192	193	194	195	196	197	198	199	200	201	202	203	204	205	206	207	208	209	210	211	212	213	214	215	216	217	218	219	220	221	222	223	224	225	226	227	228	229	230	231	232	233	234	235	236	237	238	239	240	241	242	243	244	245	246	247	248	249	250	251	252	253	254	255	256	257	258	259	260	261	262	263	264	265	266	267	268	269	270	271	272	273	274	275	276	277	278	279	280	281	282	283	284	285	286	287	288	289	290	291	292	293	294	295	296	297	298	299	300	301	302	303	304	305	306	307	308	309	310	311	312	313	314	315	316	317	318	319	320	321	322	323	324	325	326	327	328	329	330	331	332	333	334	335	336	337	338	339	340	341	342	343	344	345	346	347	348	349	350	351	352	353	354	355	356	357	358	359	360	361	362	363	364	365	366	367	368	369	370	371	372	373	374	375	376	377	378	379	380	381	382	383	384	385	386	387	388	389	390	391	392	393	394	395	396	397	398	399	400	401	402	403	404	405	406	407	408	409	410	411	412	413	414	415	416	417	418	419	420	421	422	423	424	425	426	427	428	429	430	431	432	433	434	435	436	437	438	439	440	441	442	443	444	445	446	447	448	449	450	451	452	453	454	455	456	457	458	459	460	461	462	463	464	465	466	467	468	469	470	471	472	473	474	475	476	477	478	479	480	481	482	483	484	485	486	487	488	489	490	491	492	493	494	495	496	497	498	499	500	501	502	503	504	505	506	507	508	509	510	511	512	513	514	515	516	517	518	519	520	521	522	523	524	525	526	527	528	529	530	531	532	533	534	535	536	537	538	539	540	541	542	543	544	545	546	547	548	549	550	551	552	553	554	555	556	557	558	559	560	561	562	563	564	565	566	567	568	569	570	571	572	573	574	575	576	577	578	579	580	581	582	583	584	585	586	587	588	589	590	591	592	593	594	595	596	597	598	599	600	601	602	603	604	605	606	607	608	609	610	611	612	613	614	615	616	617	618	619	620	621	622	623	624	625	626	627	628	629	630	631	632	633	634	635	636	637	638	639	640	641	642	643	644	645	646	647	648	649	650	651	652	653	654	655	656	657	658	659	660	661	662	663	664	665	666	667	668	669	670	671	672	673	674	675	676	677	678	679	680	681	682	683	684	685	686	687	688	689	690	691	692	693	694	695	696	697	698	699	700	701	702	703	704	705	706	707	708	709	710	711	712	713	714	715	716	717	718	719	720	721	722	723	724	725	726	727	728	729	730	731	732	733	734	735	736	737	738	739	740	741	742	743	744	745	746	747	748	749	750	751	752	753	754	755	756	757	758	759	760	761	762	763	764	765	766	767	768	769	770	771	772	773	774	775	776	777	778	779	780	781	782	783	784	785	786	787	788	789	790	791	792	793	794	795	796	797	798	799	800	801	802	803	804	805	806	807	808	809	810	811	812	813	814	815	816	817	818	819	820	821	822	823	824	825	826	827	828	829	830	831	832	833	834	835	836	837	838	839	840	841	842	843	844	845	846	847	848	849	850	851	852	853	854	855	856	857	858	859	860	861	862	863	864	865	866	867	868	869	870	871	872	873	874	875	876	877	878	879	880	881	882	883	884	885	886	887	888	889	890	891	892	893	894	895	896	897	898	899	900	901	902	903	904	905	906	907	908	909	910	911	912	913	914	915	916	917	918	919	920	921	922	923	924	925	926	927	928	929	930	931	932	933	934	935	936	937	938	939	940	941	942	943	944	945	946	947	948	949	950	951	952	953	954	955	956	957	958	959	960	961	962	963	964	965	966	967	968	969	970	971	972	973	974	975	976	977	978	979	980	981	982	983	984	985	986	987	988	989	990	991	992	993	994	995	996	997	998	999	1000	1001	1002	1003	1004	1005	1006	1007	1008	1009	1010	1011	1012	1013	1014	1015	1016	1017	1018	1019	1020	1021	1022	1023	1024	1025	1026	1027	1028	1029	1030	1031	1032	1033	1034	1035	1036	1037	1038	1039	1040	1041	1042	1043	1044	1045	1046	1047	1048	1049	1050	1051	1052	1053	1054	1055	1056	1057	1058	1059	1060	1061	1062	1063	1064	1065	1066	1067	1068	1069	1070	1071	1072	1073	1074	1075	1076	1077	1078	1079	1080	1081	1082	1083	1084	1085	1086	1087	1088	1089	1090	1091	1092	1093	1094	1095	1096	1097	1098	1099	1100	1101	1102	1103	1104	1105	1106	1107	1108	1109	1110	1111	1112	1113	1114	1115	1116	1117	1118	1119	1120	1121	1122	1123	1124	1125	1126	1127	1128	1129	1130	1131	1132	1133	1134	1135	1136	1137	1138	1139	1140	1141	1142	1143	1144	1145	1146	1147	1148	1149	1150	1151	1152	1153	1154	1155	1156	1157	1158	1159	1160	1161	1162	1163	1164	1165	1166	1167	1168	1169	1170	1171	1172	1173	1174	1175	1176	1177	1178	1179	1180	1181	1182	1183	1184	1185	1186	1187	1188	1189	1190	1191	1192	1193	1194	1195	1196	1197	1198	1199	1200	1201	1202	1203	1204	1205	1206	1207	1208	1209	1210	1211	1212	1213	1214	1215	1216	1217	1218	1219	1220	1221	12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TABLE G.--Acceptability and recognition of criterion number 7 in State plans for financing pupil transportation by State, 1963

State	Criterion number 7.--A State plan should require the local school district or local administrative unit to maintain adequate accounting records and reports.					
	Acceptability of the criterion by State directors of pupil transportation			Means by which criterion is currently recognized in State plans for financing pupil transportation		
	Acceptable	Acceptable in part	Not acceptable	Statute and/or State aid formula	Administrative rules and regulations (including standards)	Recommended practices encouraged through State leadership activities
1	2	3	4	5	6	7
Alabama	X	-	-	-	-	X
Alaska	X	-	-	-	X	-
Arizona 1,2/	-	-	-	-	-	-
Arkansas	X	-	-	X	-	-
California	X	-	-	-	X	X
Colorado 1/	-	-	-	-	-	-
Connecticut	X	-	-	X	X	-
Delaware	X	-	-	-	X	-
Florida	X	-	-	-	X	-
Georgia	X	-	-	X	X	-
Hawaii 2/	X	-	-	-	-	-
Idaho	X	-	-	X	X	-
Illinois	X	-	-	-	X	-
Indiana	X	-	-	-	-	X
Iowa	X	-	-	-	X	-
Kansas	X	-	-	-	-	-
Kentucky	X	-	-	-	X	X
Louisiana	X	-	-	X	X	-
Maine	X	-	-	X	-	-
Maryland	X	-	-	-	-	X
Massachusetts	X	-	-	-	-	-
Michigan	X	-	-	-	-	X
Minnesota	X	-	-	-	X	-
Mississippi	X	-	-	X	-	-
Missouri	X	-	-	X	-	-
Montana	X	-	-	X	X	-
Nebraska 2/	X	-	-	-	-	-
Nevada	X	-	-	-	X	X
New Hampshire 2/	X	-	-	-	-	-
New Jersey	X	-	-	-	X	X
New Mexico	X	-	-	-	X	-
New York	X	-	-	X	X	X
North Carolina	X	-	-	X	-	-
North Dakota	X	-	-	X	X	-
Ohio	X	-	-	-	X	X
Oklahoma	X	-	-	X	-	-
Oregon	X	-	-	X	X	X
Pennsylvania	X	-	-	-	X	-
Rhode Island	X	-	-	X	X	-
South Carolina 1,3/	-	-	-	-	-	-
South Dakota 2/	X	-	-	-	-	-
Tennessee	-	X	-	-	-	X
Texas	X	-	-	-	X	-
Utah	X	-	-	X	-	-
Vermont 2/	X	-	-	-	-	-
Virginia	4/	4/	4/	-	X	-
Washington	X	-	-	-	X	X
West Virginia	X	-	-	-	X	X
Wisconsin	-	X	-	-	X	-
Wyoming	X	-	-	X	-	-

1/No data reported.

2/No State aid for transportation allocated.

3/Entire cost of pupil transportation program borne by State.

4/No opinion expressed.

TABLE H.--Acceptability and recognition of criterion number 8 in State plans for financing pupil transportation by State, 1963

State	Criterion number 8.--A State plan should provide for consideration of factors beyond the control of local units, such as population density, road conditions, and geographical barriers.					
	Acceptability of the criterion by State directors of pupil transportation			Means by which criterion is currently recognized in State plans for financing pupil transportation		
	Acceptable	Acceptable in part	Not acceptable	Statute and/or State aid formula	Administrative rules and regulations (including standards)	Recommended practices encouraged through State leadership activities
1	2	3	4	5	6	7
Alabama	-	X	-	X	-	-
Alaska	X	-	-	-	X	-
Arizona 1/2/	-	-	-	-	-	-
Arkansas	X	-	-	-	X	-
California	-	X	-	-	-	X
Colorado 1/	-	-	-	-	-	-
Connecticut	X	-	-	-	-	X
Delaware	-	X	-	-	-	X
Florida	X	-	-	X	-	-
Georgia	X	-	-	X	X	X
Hawaii 2/	X	-	-	-	-	-
Idaho	X	-	-	X	X	-
Illinois	-	X	-	X	-	-
Indiana	X	-	-	X	-	-
Iowa	-	-	X	-	-	-
Kansas	X	-	-	-	-	-
Kentucky	X	-	-	X	X	-
Louisiana	X	-	-	X	-	X
Maine	X	-	-	-	-	X
Maryland	X	-	-	X	-	-
Massachusetts	X	-	-	-	-	-
Michigan	X	-	-	-	X	-
Minnesota	-	X	-	-	-	X
Mississippi	X	-	-	X	X	-
Missouri	-	X	-	X	-	-
Montana	-	-	X	-	-	-
Nebraska 2/	-	X	-	-	-	-
Nevada	X	-	-	-	-	-
New Hampshire 2/	X	-	-	-	-	-
New Jersey	X	-	-	X	X	-
New Mexico	X	-	-	X	-	-
New York	-	X	-	X	X	X
North Carolina	X	-	-	-	X	-
North Dakota	X	-	-	X	-	-
Ohio	X	-	-	X	X	X
Oklahoma	-	X	-	-	-	X
Oregon	X	-	-	-	X	X
Pennsylvania	-	X	-	X	-	-
Rhode Island	-	X	-	-	-	-
South Carolina 1/3/	-	-	-	-	-	-
South Dakota 2/	-	X	-	-	-	-
Tennessee	-	X	-	X	-	-
Texas	-	X	-	X	-	-
Utah	-	X	-	-	-	-
Vermont 2/	X	-	-	-	-	-
Virginia	-	-	X	-	-	-
Washington	X	-	-	-	X	X
West Virginia	-	-	-	X	-	-
Wisconsin	-	-	X	X	-	-
Wyoming	X	-	-	-	-	-

1/No data reported.

2/No State aid for transportation allocated.

3/Entire cost of pupil transportation program borne by State.

TABLE I.--Acceptability and recognition of criterion number 9 in State plans for financing pupil transportation by State, 1963

State	Criterion number 9.--A State plan should provide for subsistence for pupils in lieu of transportation within reasonable limitations.					
	Acceptability of the criterion by State directors of pupil transportation			Means by which criterion is currently recognized in State plans for financing pupil transportation		
	Acceptable	Acceptable in part	Not acceptable	Statute and/or State aid formula	Administrative rules and regulations (including standards)	Recommended practices encouraged through State leadership activities
1	2	3	4	5	6	7
Alabama	-	-	X	-	-	-
Alaska	X	-	-	-	-	-
Arizona 1/2/	-	-	-	-	-	-
Arkansas	X	-	-	-	X	-
California	X	-	-	X	-	-
Colorado 1/	-	-	-	-	-	-
Connecticut	-	X	-	X	-	-
Delaware	X	-	-	-	-	X
Florida	X	-	-	X	X	-
Georgia	X	-	-	-	X	-
Hawaii 2/	-	-	X	-	-	-
Idaho	X	-	-	X	X	-
Illinois	-	X	-	X	-	-
Indiana	-	X	-	-	-	-
Iowa	-	X	-	-	-	-
Kansas	X	-	-	3/X	-	-
Kentucky	X	-	-	-	X	-
Louisiana	-	X	-	X	-	-
Maine	X	-	-	X	-	-
Maryland	X	-	-	-	X	-
Massachusetts	X	-	-	X	-	-
Michigan	X	-	-	X	-	-
Minnesota	X	-	-	X	X	-
Mississippi	-	-	X	-	-	-
Missouri 1/	-	-	-	-	-	-
Montana	X	-	-	X	-	-
Nebraska 2/	-	-	X	-	-	-
Nevada	X	-	-	X	X	-
New Hampshire 2/	X	-	-	-	-	-
New Jersey	-	-	X	-	-	-
New Mexico	X	-	-	-	-	X
New York	X	-	-	X	X	X
North Carolina	X	-	-	X	-	-
North Dakota	-	-	X	-	-	-
Ohio	X	-	-	X	-	-
Oklahoma	-	X	-	-	-	-
Oregon	X	-	-	X	-	X
Pennsylvania	X	-	-	X	-	-
Rhode Island	X	-	-	X	X	-
South Carolina 1/4/	-	-	-	-	-	-
South Dakota 2/	X	-	-	-	-	-
Tennessee	X	-	-	X	-	-
Texas	-	-	X	-	-	-
Utah	X	-	-	X	-	-
Vermont 2/	X	-	-	X	-	-
Virginia	-	-	X	-	-	-
Washington	X	-	-	X	X	-
West Virginia	-	X	-	-	X	-
Wisconsin	X	-	-	X	-	-
Wyoming	X	-	-	X	-	-

1/No data reported.

2/No State aid for transportation allocated.

3/Applicable only in regards to special education.

4/Entire cost of pupil transportation program borne by State.

TABLE J.--Acceptability and recognition of criterion number 10 in State plans for financing pupil transportation by State, 1963

State	Criterion number 10.--A State plan should not tend to discourage desirable reorganization of local units and attendance areas.					
	Acceptability of the criterion by State directors of pupil transportation			Means by which criterion is currently recognized in State plans for financing pupil transportation		
	Acceptable	Acceptable in part	Not acceptable	Statute and/or State aid formula	Administrative rules and regulations (including standards)	Recommended practices encouraged through State leadership activities
1	2	3	4	5	6	7
Alabama	-	X	-	-	X	-
Alaska	X	-	-	-	X	-
Arizona 1,2/	-	-	-	-	-	-
Arkansas	X	-	-	-	X	-
California	X	-	-	X	X	X
Colorado 1/	-	-	-	-	-	-
Connecticut	X	-	-	-	-	X
Delaware	X	-	-	-	X	-
Florida	X	-	-	-	-	X
Georgia	X	-	-	-	X	-
Hawaii 2/	X	-	-	-	-	-
Idaho	X	-	-	X	X	-
Illinois	-	X	-	-	X	-
Indiana	X	-	-	-	-	X
Iowa	X	-	-	-	-	X
Kansas	X	-	-	-	-	-
Kentucky	X	-	-	X	X	X
Louisiana	X	-	-	-	-	X
Maine	X	-	-	X	-	-
Maryland	X	-	-	-	-	X
Massachusetts	X	-	-	-	-	-
Michigan	X	-	-	-	-	X
Minnesota	X	-	-	-	-	X
Mississippi	X	-	-	-	-	-
Missouri	X	-	-	X	-	-
Montana	X	-	-	X	X	-
Nebraska 2/	X	-	-	-	-	-
Nevada	X	-	-	X	-	-
New Hampshire 2/	X	-	-	-	-	-
New Jersey	X	-	-	X	X	X
New Mexico	X	-	-	-	X	-
New York	X	-	-	X	X	X
North Carolina	X	-	-	-	X	-
North Dakota	X	-	-	-	-	-
Ohio	X	-	-	X	X	X
Oklahoma	X	-	-	-	-	X
Oregon	X	-	-	-	-	X
Pennsylvania	X	-	-	-	X	-
Rhode Island	X	-	-	X	X	-
South Carolina 1,2/	-	-	-	-	-	-
South Dakota 2/	X	-	-	-	-	-
Tennessee	X	-	-	X	-	-
Texas	X	-	-	-	-	X
Utah	X	-	-	-	-	X
Vermont 2/	X	-	-	-	-	-
Virginia	X	-	-	-	-	-
Washington	X	-	-	-	X	X
West Virginia	X	-	-	-	X	X
Wisconsin	X	-	-	-	-	X
Wyoming	X	-	-	-	-	X

1/No data reported.

2/No State aid for transportation allocated.

3/Entire cost of pupil transportation program borne by State.

Report on the results of the work done during the year 1941-42. The work done during the year 1941-42 was of a general nature and was not of a special nature.

1942

Name of the person or persons to whom the work was assigned			Name of the person or persons to whom the work was assigned			Date
First name	Last name	Initials	First name	Last name	Initials	
1	2	3	4	5	6	7
						1941
						1942
						1943
						1944
						1945
						1946
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						1997
						1998
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TABLE K.--Acceptability and recognition of criterion number 11 in State plans for financing pupil transportation by State, 1963

State	Criterion number 11.--A State plan should provide for distribution of State aid upon the basis of an objective formula.					
	Acceptability of the criterion by State directors of pupil transportation			Means by which criterion is currently recognized in State plans for financing pupil transportation		
	Acceptable	Acceptable in part	Not acceptable	Statute and/or State aid formula	Administrative rules and regulations (including standards)	Recommended practices encouraged through State leadership activities
1	2	3	4	5	6	7
Alabama	X	-	-	X	-	-
Alaska	X	-	-	-	-	-
Arizona 1,2/	-	-	-	-	-	-
Arkansas	X	-	-	-	X	-
California	X	-	-	X	-	-
Colorado 1/	-	-	-	-	-	-
Connecticut	X	-	-	X	-	-
Delaware	X	-	-	-	-	-
Florida	X	-	-	X	-	-
Georgia	X	-	-	X	-	-
Hawaii 2/	X	-	-	-	-	-
Idaho	X	-	-	X	X	-
Illinois	X	-	-	X	-	-
Indiana	X	-	-	X	-	-
Iowa	X	-	-	X	-	-
Kansas	X	-	-	X	-	-
Kentucky	X	-	-	X	X	-
Louisiana	X	-	-	X	-	-
Maine	X	-	-	X	-	-
Maryland	X	-	-	X	-	-
Massachusetts	X	-	-	X	-	-
Michigan	X	-	-	X	X	-
Minnesota	X	-	-	-	X	X
Mississippi	X	-	-	X	X	-
Missouri	X	-	-	X	-	-
Montana	X	-	-	X	-	-
Nebraska 2/	X	-	-	-	-	-
Nevada	X	-	-	-	-	-
New Hampshire 2/	X	-	-	-	-	-
New Jersey	X	-	-	X	X	X
New Mexico	X	-	-	X	-	-
New York	X	-	-	X	X	X
North Carolina	X	-	-	X	-	-
North Dakota	X	-	-	X	-	-
Ohio	X	-	-	X	-	-
Oklahoma	X	-	-	X	-	-
Oregon	X	-	-	X	-	X
Pennsylvania	X	-	-	X	-	-
Rhode Island	X	-	-	X	X	-
South Carolina 1,3/	-	-	-	-	-	-
South Dakota 2/	X	-	-	-	-	-
Tennessee	X	-	-	X	-	-
Texas	X	-	-	X	-	-
Utah	X	-	-	X	-	-
Vermont 2/	X	-	-	-	-	-
Virginia	X	-	-	-	-	-
Washington	X	-	-	X	X	-
West Virginia	X	-	-	X	-	-
Wisconsin	X	-	-	X	-	-
Wyoming	X	-	-	-	-	-

1/No data reported.

2/No State aid for transportation allocated.

3/Entire cost of pupil transportation program borne by State.

TABLE 1. -- (Continued) --
 Information on the composition of the population of the United States by race and sex, 1960

State	Percentage of the total population				Percentage of the total population		
	White	Black	Hispanic	Other	Male	Female	Total
Alabama	55.1	39.8	1.1	4.0	54.1	56.1	55.1
Alaska	95.1	0.1	0.1	4.7	95.1	95.1	95.1
Arizona	78.1	1.1	1.1	20.7	78.1	78.1	78.1
Arkansas	61.1	34.1	0.1	4.7	61.1	61.1	61.1
California	70.1	1.1	1.1	27.7	70.1	70.1	70.1
Colorado	78.1	0.1	0.1	21.8	78.1	78.1	78.1
Connecticut	81.1	0.1	0.1	18.8	81.1	81.1	81.1
Delaware	78.1	0.1	0.1	21.8	78.1	78.1	78.1
District of Columbia	81.1	0.1	0.1	18.8	81.1	81.1	81.1
Florida	61.1	34.1	0.1	4.7	61.1	61.1	61.1
Georgia	55.1	39.8	1.1	4.0	55.1	55.1	55.1
Hawaii	1.1	1.1	1.1	96.7	1.1	1.1	1.1
Idaho	81.1	0.1	0.1	18.8	81.1	81.1	81.1
Illinois	78.1	0.1	0.1	21.8	78.1	78.1	78.1
Indiana	61.1	34.1	0.1	4.7	61.1	61.1	61.1
Iowa	81.1	0.1	0.1	18.8	81.1	81.1	81.1
Kansas	61.1	34.1	0.1	4.7	61.1	61.1	61.1
Kentucky	55.1	39.8	1.1	4.0	55.1	55.1	55.1
Louisiana	55.1	39.8	1.1	4.0	55.1	55.1	55.1
Maine	81.1	0.1	0.1	18.8	81.1	81.1	81.1
Maryland	61.1	34.1	0.1	4.7	61.1	61.1	61.1
Massachusetts	81.1	0.1	0.1	18.8	81.1	81.1	81.1
Michigan	78.1	0.1	0.1	21.8	78.1	78.1	78.1
Minnesota	81.1	0.1	0.1	18.8	81.1	81.1	81.1
Mississippi	55.1	39.8	1.1	4.0	55.1	55.1	55.1
Missouri	61.1	34.1	0.1	4.7	61.1	61.1	61.1
Montana	81.1	0.1	0.1	18.8	81.1	81.1	81.1
Nebraska	61.1	34.1	0.1	4.7	61.1	61.1	61.1
Nevada	78.1	0.1	0.1	21.8	78.1	78.1	78.1
New Hampshire	81.1	0.1	0.1	18.8	81.1	81.1	81.1
New Jersey	78.1	0.1	0.1	21.8	78.1	78.1	78.1
New Mexico	78.1	0.1	0.1	21.8	78.1	78.1	78.1
New York	78.1	0.1	0.1	21.8	78.1	78.1	78.1
North Carolina	55.1	39.8	1.1	4.0	55.1	55.1	55.1
North Dakota	81.1	0.1	0.1	18.8	81.1	81.1	81.1
Ohio	61.1	34.1	0.1	4.7	61.1	61.1	61.1
Oklahoma	55.1	39.8	1.1	4.0	55.1	55.1	55.1
Oregon	78.1	0.1	0.1	21.8	78.1	78.1	78.1
Pennsylvania	78.1	0.1	0.1	21.8	78.1	78.1	78.1
Rhode Island	81.1	0.1	0.1	18.8	81.1	81.1	81.1
South Carolina	55.1	39.8	1.1	4.0	55.1	55.1	55.1
South Dakota	81.1	0.1	0.1	18.8	81.1	81.1	81.1
Tennessee	55.1	39.8	1.1	4.0	55.1	55.1	55.1
Texas	55.1	39.8	1.1	4.0	55.1	55.1	55.1
Vermont	81.1	0.1	0.1	18.8	81.1	81.1	81.1
Virginia	55.1	39.8	1.1	4.0	55.1	55.1	55.1
Washington	78.1	0.1	0.1	21.8	78.1	78.1	78.1
West Virginia	55.1	39.8	1.1	4.0	55.1	55.1	55.1
Wisconsin	81.1	0.1	0.1	18.8	81.1	81.1	81.1
Wyoming	81.1	0.1	0.1	18.8	81.1	81.1	81.1

TABLE L.--Acceptability and recognition of criterion number 12 in State plans for financing pupil transportation by State, 1963

State	Criterion number 12.--A State plan should encourage schools to broaden and extend the school program through the use of school buses.					
	Acceptability of the criterion by State directors of pupil transportation			Means by which criterion is currently recognized in State plans for financing pupil transportation		
	Acceptable	Acceptable in part	Not acceptable	Statute and/or State aid formula	Administrative rules and regulations (including standards)	Recommended practices encouraged through State leadership activities
1	2	3	4	5	6	7
Alabama	-	X	-	-	-	X
Alaska	X	-	-	-	X	-
Arizona 1,2/	-	-	-	-	-	-
Arkansas	X	-	-	-	X	-
California	-	X	-	-	X	X
Colorado 1/	-	-	-	-	-	-
Connecticut	X	-	-	-	-	X
Delaware	-	X	-	-	-	-
Florida	-	X	-	X	X	-
Georgia	X	-	-	-	X	-
Hawaii 2/	X	-	-	-	-	-
Idaho	X	-	-	X	X	-
Illinois	X	-	-	-	X	-
Indiana	-	-	X	-	-	-
Iowa	X	-	-	X	X	-
Kansas	X	-	-	X	-	-
Kentucky	3/	3/	3/	-	X	X
Louisiana	X	-	-	-	-	X
Maine	X	-	-	X	-	-
Maryland	X	-	-	-	-	X
Massachusetts	X	-	-	-	-	-
Michigan	X	-	-	X	-	X
Minnesota	-	X	-	-	-	X
Mississippi	X	-	-	X	-	-
Missouri	X	-	-	-	X	-
Montana	X	-	-	X	X	-
Nebraska 2/	-	X	-	-	-	-
Nevada	X	-	-	-	-	-
New Hampshire 2/	X	-	-	-	-	-
New Jersey	X	-	-	-	X	X
New Mexico	-	X	-	-	-	-
New York	X	-	-	X	X	X
North Carolina	X	-	-	-	X	-
North Dakota	X	-	-	X	-	-
Ohio	X	-	-	X	X	X
Oklahoma	-	X	-	-	X	-
Oregon	X	-	-	X	-	X
Pennsylvania	X	-	-	X	-	-
Rhode Island	X	-	-	X	X	-
South Carolina 1,4/	-	-	-	-	-	-
South Dakota 2/	X	-	-	-	-	-
Tennessee	-	X	-	-	X	-
Texas	X	-	-	-	X	-
Utah	-	X	-	-	-	X
Vermont 2/	X	-	-	-	-	X
Virginia	X	-	-	-	-	-
Washington	X	-	-	X	X	-
West Virginia	-	X	-	X	-	X
Wisconsin	X	-	-	X	-	-
Wyoming	X	-	-	-	-	-

1/No data reported.

2/No State aid for transportation allocated.

3/No opinion expressed.

4/Entire cost of pupil transportation program borne by State.

TABLE 1. -- *Continued* --
 (1) This table is a continuation of table 1, page 267, and should be read in conjunction with the instructions on page 267.

State	Responsibility of the contractor by State Division of Civil Engineering					Notes on which contract is made
	Design	Construction	Inspection	Testing	Materials	
Alabama
Alaska
Arizona
Arkansas
California
Colorado
Connecticut
Delaware
District of Columbia
Florida
Georgia
Hawaii
Idaho
Illinois
Indiana
Iowa
Kansas
Kentucky
Louisiana
Maine
Maryland
Massachusetts
Michigan
Minnesota
Mississippi
Missouri
Montana
Nebraska
Nevada
New Hampshire
New Jersey
New Mexico
New York
North Carolina
North Dakota
Ohio
Oklahoma
Oregon
Pennsylvania
Rhode Island
South Carolina
South Dakota
Tennessee
Texas
Vermont
Virginia
Washington
West Virginia
Wisconsin
Wyoming

This table is a continuation of table 1, page 267, and should be read in conjunction with the instructions on page 267.

This table is a continuation of table 1, page 267, and should be read in conjunction with the instructions on page 267.

This table is a continuation of table 1, page 267, and should be read in conjunction with the instructions on page 267.

This table is a continuation of table 1, page 267, and should be read in conjunction with the instructions on page 267.

ADDITIONAL COMMENTS SUBMITTED BY THE 50 STATE DIRECTORS
RELATIVE TO THE ACCEPTABILITY OF CERTAIN SELECTED
CRITERIA FOR EVALUATING STATE PLANS FOR
FINANCING PUPIL TRANSPORTATION

<u>State</u>	<u>Criteria</u>	<u>Comment</u>
Alabama	No. 2	Delete No. 2 as No. 1 will provide sufficient funds
	No. 4	Could lead to deficit spending
	No. 9	Delete--subsistence responsibility of family
Connecticut	No. 1	. . . local effort to operate (or to contract) safe, . . . How about a system of contracting buses?
Georgia	No. 3	(Statute and/or State aid formula) school bus only (Recommended practices . . .) shop and equipment
Hawaii	No. 9	We do not believe the schools should ever be made responsible for subsistence for school children because of the distance their home is from school.
Idaho	No. 3	Depreciation considered
	No. 4	Depreciation considered
Iowa	No. 9	This is probably necessary in some States, but it is not needed in Iowa at the present time.

<u>State</u>	<u>Criteria</u>	<u>Comments</u>
Kansas	No. 1	(Statute and/or State aid formula) inadequate
	No. 5	(Statute and/or State aid formula) by Kansas Highway Department
	No. 6	Not provided
	No. 8	Not used
	No. 9	(Statute and/or State aid formula) only in special education
	No. 10	Ours tends
Massachusetts	No. 3	Buses and equipment only
	No. 4	Buses only
Minnesota	No. 2	(Equalization)
	No. 3	Acceptable (if school owned and operated)
Missouri	No. 3	Too difficult to administer. State aid for capital outlay could result in excessive expenditures unless rigid safe guards were required.
	No. 4	Same as for No. 3.
	No. 9	May be desirable in some States with very sparse population.
Nebraska	No. 6	Meaning not clear
New Jersey	No. 4	Building school bus garages might rather be included in school plant construction rather than pupil transportation cost.

<u>State</u>	<u>Criteria</u>	<u>Comments</u>
New Jersey	No. 9	This criteria in New Jersey might tend to discourage local districts from building adequate school facilities.
North Carolina	No. 3	Bus equipment is acceptable, purchase of school buses and erection of bus shops are not.
North Dakota	No. 9	Although it is necessary in some cases to provide for payment in lieu of transportation, we in this State hesitate to make this a part of the State aid program. We find the greatest disregard for law in supporting non-public schools in those districts which provide payments in lieu of transportation. Parents, and sometimes school boards, will ignore the fact that these payments cannot be made to those attending non-public schools.
Oregon	No. 2	No. 2 overlaps 1, 3, 4, and 5. Why have it?
Texas	No. 9	Provide for subsistence for pupils in lieu of transportation within reasonable limitations. We do not recognize this criteria. Do not approve of such a procedure.
Washington	No. 3	This item is important, but there must be some control of prices districts pay for buses and equipment upon which they receive State reimbursement.
Wyoming	No. 1	(Public schools)

Suggested additions

<u>State</u>	<u>Comments</u>
Arkansas	A road factor or a mileage factor would be a good criteria if there is some control over changes in bus routes. We have no such criteria.
Georgia	<p>During the last two years Georgia has made such studies in 143 of our 159 counties. This is a joint undertaking by the State Department of Education and county boards of education. Local administrators have had a chance to see other programs as well as their own. Common criteria have been used thereby moving toward common practices in the administration and operation of school transportation programs. So far these surveys have removed about 15% of excess mileage in our programs and reduced the average route length of the State by about 17%. We believe that ultimately this will result in more equitable treatment of all counties in the distribution of State aid by our formula. We are convinced such local studies are the foundation of a much improved school transportation program. However, it is a never ending job.</p> <p>Provide for local studies of local school transportation programs to include organizing routing arrangements in accordance with needs of pupils; changes in attendance areas; consolidation of schools, expenditures and budget requirements. This points toward adequate service, equalization of education opportunities, safety, and economical and efficient operation.</p> <p>Provide for training of drivers and mechanics.</p>

Suggested additions--continued

<u>State</u>	<u>Comments</u>
Indiana	Selection, training, and supervision of driver, and maintenance of equipment.
Iowa	We prefer the flat rate method (in our case \$30 per pupil per year) to a complicated formula. This leaves most of the control at the local level, but permits us to exercise supervision of buses, drivers, routes, etc., through legal provisions and administrative regulations.
Kentucky	Require districts to purchase school transportation equipment that meets definite safety specifications in order to receive State aid. Require districts to maintain certain levels of service in order to receive State aid.
Massachusetts	State grants-in-aid for transportation should be equalizing.
Missouri	No. 11 should be objective in the factors included in the formula, but the amount of State aid flexible.
New Jersey	Stimulate annual inservice training for school bus drivers.

Suggested additions--continued

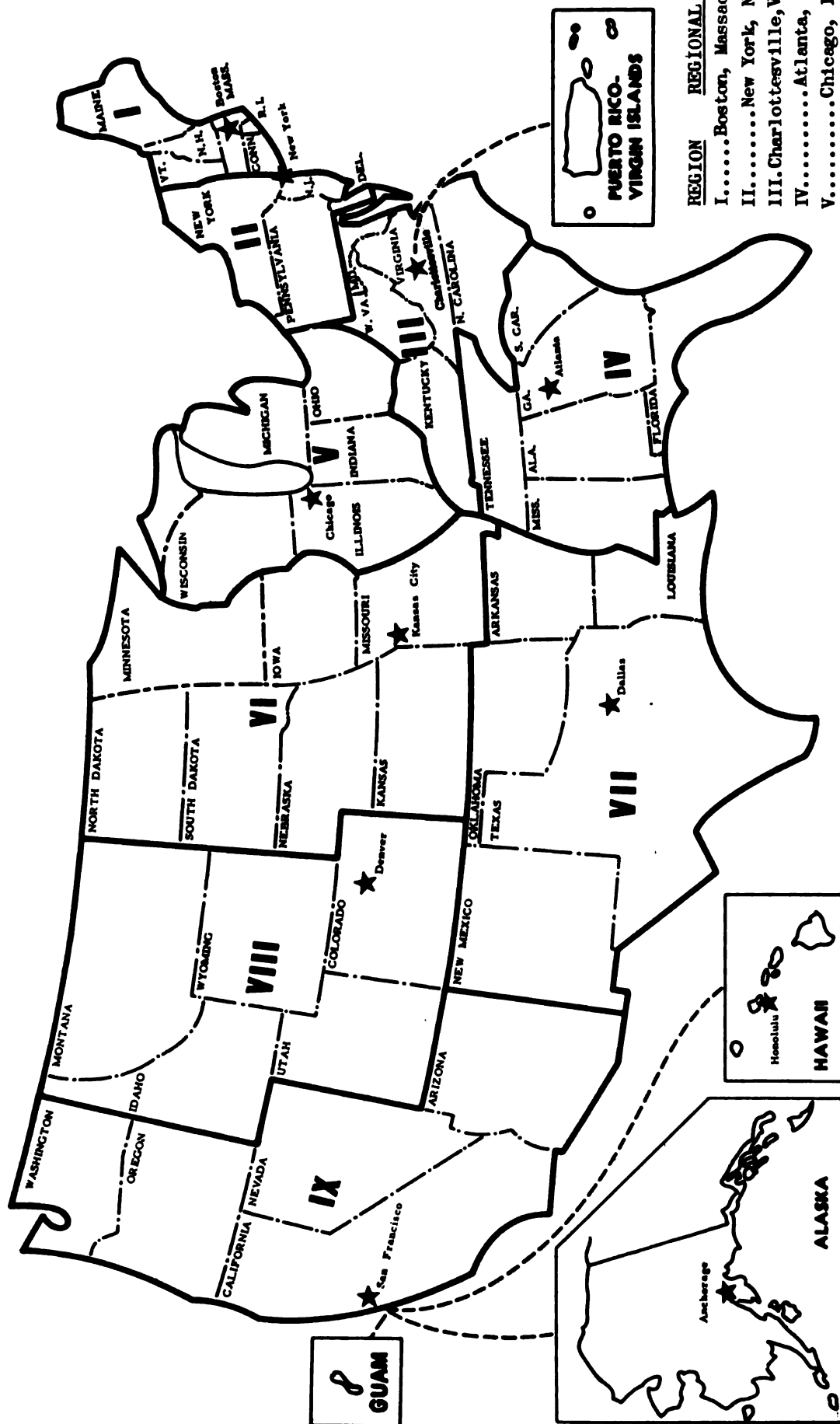
<u>State</u>	<u>Comments</u>
North Dakota	We believe a criterion could be added in regard to an equalization feature in providing State aid for transportation. It is our belief that a State aid formula which provides most or all of the transportation cost encourages abuse of the vehicles in a public transportation system. It is our belief that the school district should provide some of the support for transportation. In order to make public transportation available to all students, an equalization feature must be present.
Washington	It appears to us that a good plan should recognize the difference between replaced buses and additional buses caused by increase in number of children served or distance traveled.
West Virginia	Provides for: Specific allowances for in lieu of transportation facilities.
<u>General comments</u>	
Illinois	Illinois attempts to recognize the listed 12. However, to fulfill our needs there must be some minor changes to the statutes with which, I'm sure, you are familiar.
Indiana	Should take into consideration financial ability of the local school district. Should take into consideration distance from homes to school, route hazards, and age of children.

General comments--continued

<u>State</u>	<u>Comments</u>
Iowa	(No. 3, 4, and 8) We believe the State should not reimburse more than 50% of the cost of transportation. We prefer a flat rate per pupil rather than a complicated formula which would tend to take away local control. We can control condition of equipment through annual inspections. We tried a formula containing factors listed in No. 8, but this did not prove satisfactory.
New Hampshire	I have nothing to add or delete, but would add a comment. The importance of some of the criteria to a specific situation would need to be judged by the allowance made for other criteria. In short, they overlap considerably.
New Mexico	Tentative formula to be considered by the State legislature.
West Virginia	Provide for: State funds obtained for transportation to be used for transportation only. Provides for revision of formula to compensate for increase or decrease of costs of services, equipment, and supplies.
Wyoming	In my opinion, the 12 criteria listed will suffice if properly executed. There could be a possibility that too many criteria would cause confusion rather than simplicity.

APPENDIX D

MAP OF THE UNITED STATES DIVIDED
INTO NINE REGIONAL AREAS



MICHIGAN STATE UNIV. LIBRARIES



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