

MOVING FORWARD: A PLAN FOR PUBLIC TRANSIT IN BERRIEN COUNTY



DRAFT FINAL REPORT, MAY 2014

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EXECUTIVE SUMMARY

Currently four transit systems operate in Berrien County, the only county in Michigan to have four separate public transportation providers. The result is a fragmented system that is difficult for residents to navigate and involves similar administrative functions at multiple systems. In addition, various opportunities exist to use resources more efficiently and effectively, highlighted by the fact that despite spending over \$4 million to operate the four systems in FY2013, some areas of Berrien County are still unserved.

The four transit systems in Berrien County provide a variety of transit services that are discussed in detail in this plan, with Chapter 4 specifically detailing current transit services (e.g. service area, organizational structures, funding, passenger trips, operating expenses, etc.). The service areas for the four systems are depicted in Figure ES-1.

In 2009 the Berrien County Coordinated Transportation Coalition, made up of 23 members representing 18 organizations, expressed interest in developing a plan to identify opportunities to streamline transit service, simplify and improve access for riders, and create a robust transit system to meet the growing and changing needs of residents. *Moving Forward: A Plan for Public Transit in Berrien County* is the result, the culmination of a transit consolidation feasibility study. Prepared for Berrien County stakeholders, this plan reviews the issues discussed, considered, and analyzed during the project, and serves as a blueprint for future efforts to provide countywide transit services and to improve mobility in Berrien County.

The Case for Consolidation—and the Realities

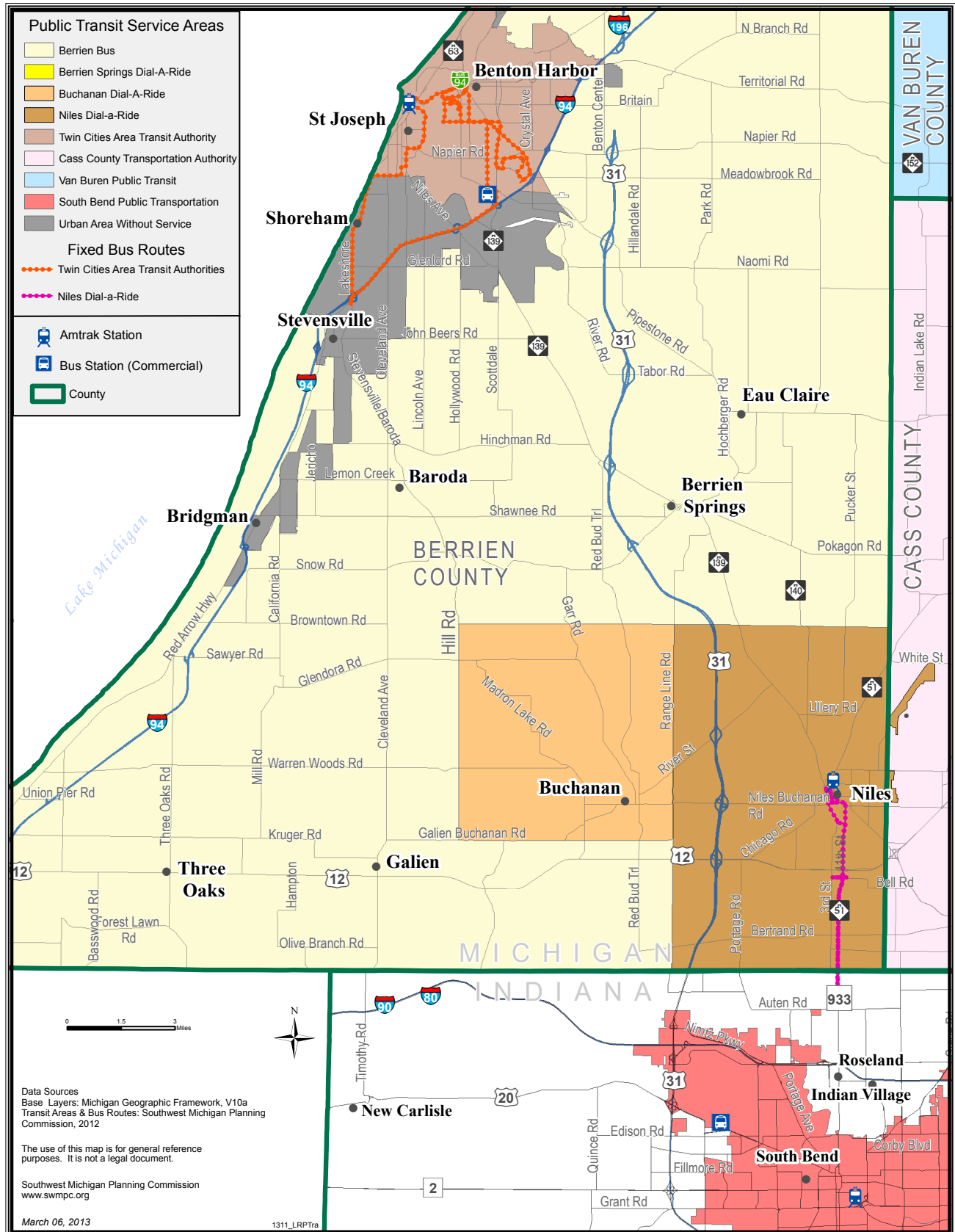
This plan includes extensive data and information on the four transit systems currently operating in Berrien County. It also discusses opportunities to improve transit services in the County through expanded coordination or mobility management efforts. However, based on the significant data available for evaluation, it is intuitive that consolidation and the provision of transit services through one countywide program is the most efficient and effective way to provide public transportation in the County.

But while consolidation of the four systems into one entity is intuitive, there are significant challenges that are primarily institutional and political in nature. Experience indicates that these issues must be resolved for meaningful coordination/consolidation to take effect. Therefore, while this plan discusses a variety of areas related to implementing a countywide system, in reality moving ahead with any of these alternatives will come down to the actions of local stakeholders and decision makers and the desire to try a new approach.

Vision for Transit Services in Berrien County

While the four transit providers in Berrien County are working hard to provide transportation for County residents, there is no apparent collective vision for public transportation services. Many factors will impact improved coordination of transit services or any potential countywide arrangement, but a

Figure ES-1: Public Transit Service Areas



collective vision is imperative in order to provide more efficient and effective transit and to meet existing and unmet mobility needs in the County. A proposed vision that can serve as the foundation for future discussions—and as a reminder when difficult issues are being tackled—is:

The vision for public transit services in Berrien County is a safe, efficient, affordable, and customer friendly system that works to meet the mobility needs of the residents of the County.

Why Implement One Countywide Transit System?

There are compelling reasons for the four transit providers in Berrien County to consolidate services into one countywide transit system. While various aspects related to the decision to implement a countywide transit system are discussed in detail throughout this plan, and many advantages of one countywide transit system are interrelated, the primary reasons involve:

- Saving money by reducing administrative and management costs through the elimination of duplicative functions such as accounting and finance, human resources, procurement, and grant management.
- Reducing overall operating costs by using one scheduling/dispatch center, handling marketing through one entity, conducting service planning through one office, performing vehicle maintenance through one location, and other operational efficiencies. The overall costs of one countywide service would be less than the sum of the operating costs for the current individual systems.
- Providing seamless connections for County residents between transit services and eliminating the need to pay multiple fares for in-county trips. A countywide transit system would also offer the opportunity for more efficient routing, planning, and scheduling of these services.
- Fulfilling current and future unmet transportation needs by directing cost savings to gaps in current services and establishing an organizational structure that can plan and implement services to support future growth in need for transit services, including the projected increase in older adult and youth populations needing additional mobility options.
- Increasing ridership through a countywide transit system that is easier to understand and to navigate. A countywide system would also be more conducive to an improved marketing and outreach campaign that allows customers to access a single point of contact for information on available transit services in Berrien County, as well as a coordinated fare policy that is easier to understand and is more equitable.
- Increasing funding opportunities, as a countywide system would have the ability to facilitate a possible countywide millage that would support expanded public transit services while reducing the millage rates in jurisdictions that currently have one. One countywide system would also prepare Berrien County in the event legislation at the State level would be approved that would reduce funding for counties with multiple transit systems.
- Ensuring more efficient use of resources, including the improved use of current facilities and a consolidated vehicle maintenance management system that uses parts inventories more effectively. Through a countywide system there would also be more effective use of current vehicles and more flexibility in service delivery, as all vehicles would be seen as one fleet and not as separate pieces that cannot be interchanged.
- Providing safer public transit services through a singular uniform training program, use of street supervisors following similar and consistent procedures, and the implementation of a position dedicated to safety and training.

GOVERNANCE CONSIDERATIONS

For the most part, the four transit systems operating in Berrien County operate independent of each other from an organizational standpoint. The only exception is that both Berrien Bus and Buchanan Dial-A-Ride services are contracted through the same provider (TMI). Still, each system has its own organizational structure and administrative staff. Each system has its own oversight board and its own Local Advisory Committee (LAC), which provides public feedback about the system.

After discussion, the project advisory committee supported the formation of a new authority that would assume current Berrien Bus services and would provide the foundation for future efforts to provide countywide transit services. A new transit authority would be organized under the State of Michigan Public Transportation Act (Act 196 of 1986), which authorizes the formation of public transportation authorities with certain general powers and duties. This new Berrien County Transit Authority (BCTA) would be an independent governmental unit and would have the ability to levy a millage.

BCTA Board of Directors

The BCTA would have a Board of Directors whose primary purpose would be to assure that the authority fulfills its mission and meets its goals. After review of the various governance options and discussions with the advisory committee and community stakeholders, it appears that a nine to eleven member Board that considers Berrien County Board of County Commissioner districts, geographical distribution, urban boundaries, and existing transit systems would be the most conducive. While the Board composition will be finalized after discussions between the Board of County Commissioners and Berrien County staff, it is anticipated that it would include:

- Three members comprised of one member from each of the other current transit systems operating in Berrien County. These three members would cover approximately six commissioner districts.
- Five members from the county at large. These 5 members would cover areas generally represented by five commissioner districts.
- One member from the County Board of Commissioners.
- If desired an additional two members could be added for a maximum size Board of eleven.

The advantages of this structure include:

- All areas of Berrien County would be represented,
- The Berrien County District is already understood by the Commissioners and the general public,
- While initially transit services would still be operated by different systems, the oversight by this structure would help to ensure that services are viewed on a countywide basis from the outset, and
- Arrangements would be in place for appropriate discussions of a potential countywide millage to support transit services.

Beyond the Board structure it will be important to gain input from a wide range of local stakeholders. An advisory committee that incorporates the LAC role and includes additional representatives could be formed. In addition, the same Michigan Act that allows for the creation of a public transportation authority also includes a provision that allows new membership after the formation of an authority.

STAFFING CONSIDERATIONS

Each of the four transit systems has staff involved in management and operations. As a result, countywide there are thirteen positions involved in management or administrative functions and seventeen involved in operations and dispatching. This is much greater than would typically be needed for the number of vehicles being operated. The savings through a more coordinated or consolidated system could be redirected to expansion of services to help meet gaps in public transportation in the County.

Two possible organizational charts depicting staffing structure are provided in Figures ES-2 and ES-3. Figure ES-2 provides a conceptual organizational chart to support the initial formation of the BCTA. It assumes that services would continue to be contracted. Figure ES-3 provides a conceptual staffing plan to support the broader vision of one countywide transit system through which services are operated directly.

Figure ES-2: Berrien County Transit Authority Conceptual Organizational Chart

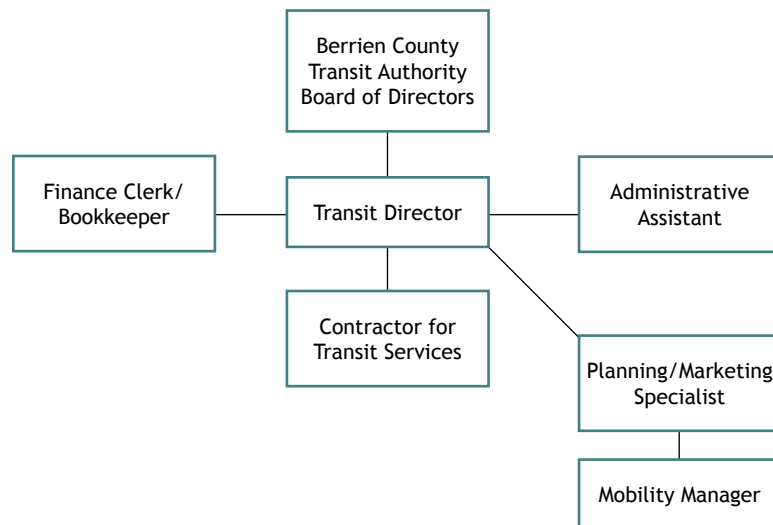
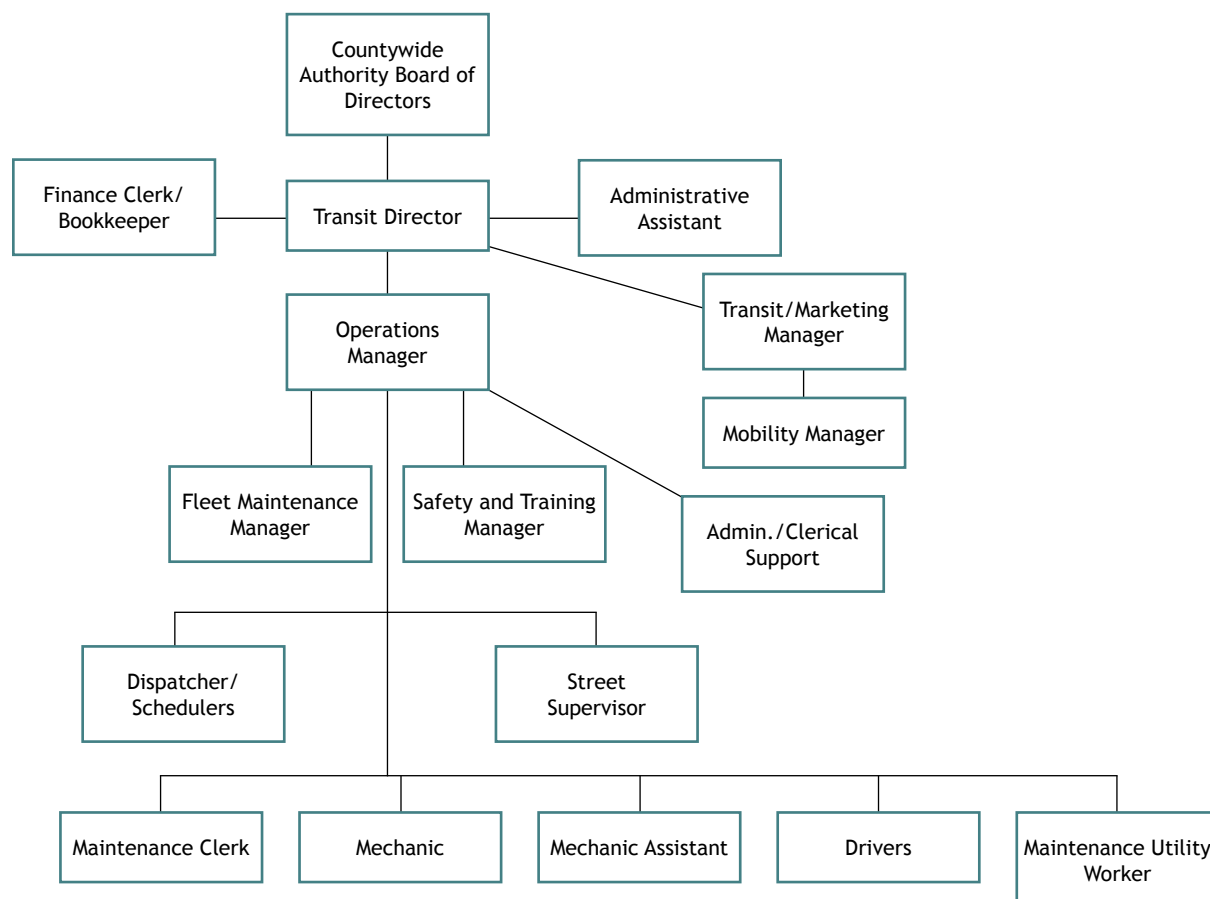


Figure ES-3: Countywide Services Conceptual Organizational Chart



SERVICE AND OPERATIONAL CONSIDERATIONS

Despite the four independently operating transit systems, there are still areas of Berrien County that receive no public transit services. Approximately 47 percent of the St. Joseph/Benton Harbor urbanized area receives very limited or no service. Communities impacted are St. Joseph Township, Lincoln Township, Royalton Township, and the City of Bridgman. In addition, services are planned independently and each system has its own fare structure. Thus there are instances where residents must transfer between multiple providers, endure a long travel time to make short trips, and pay multiple fares.

One system can view and operate these various services on a countywide basis, and consider service expansions to fill gaps. This plan proposes 93,285 annual service hours, an increase of about 17 percent over FY2013.

FUNDING CONSIDERATIONS

The four transit systems are currently funded through federal, state, and local sources. A countywide system would continue to be eligible for these programs, and would also respond to the following key funding issues:

- A countywide transit system could serve as the single point of contact with the Michigan Department of Transportation (MDOT) for all state programs, and would apply for funding and submit reports for the County. This arrangement would be especially important if legislation being considered at the state level to decrease MDOT funding to any counties with multiple transit systems is approved.
- The BCTA would have the ability to levy a millage with the approval of a majority of the registered electors residing in the portion of the County served by the authority through a general or special election. The additional funds obtained through a possible millage could be used to expand services.

The Southwest Michigan Planning Commission (SWMPC) worked with the Berrien County Equalization Department to determine the potential revenue from a countywide millage at a .25 rate. Based on the FY 2013 taxable value in the County, Table ES-1 shows the substantial increase in revenues that are possible through this countywide millage even though the rate is substantially lower in the areas of the County that currently have a millage in place. It should be noted that future taxable values may be less.

Table ES-1: Projected Revenues from Countywide Millage

Transit System	Jurisdiction	Current Millage Rate	Total Millage Revenues FY 2013 (1)
TCATA	Benton Harbor	1.25	\$110,070
Buchanan Dial-a-Ride	City of Buchanan	1	\$81,272
Niles Dial-a-Ride	City of Niles	0.5	\$95,912
		Total	\$287,254

Possible Millage Rate	Projected Millage Revenue (2)	Increase Over FY 2013
0.25	\$1,753,726	\$1,466,472

(1) Source: Individual transit systems.
(2) Source: Berrien County Equalization Department based on 2013 Equalization Report.

This plan provides a conceptual financial plan for operating existing and proposed transit services on a countywide basis over a five-year planning period. The annual operating expenses for a countywide system are projected to grow from about \$3.8 million to over \$5 million during the five year period. The

local amount needed through a millage would increase to about \$903,469 over the five year time frame. However, this amount is still much less than the projected revenue through a countywide millage, and allows for consideration of other service expansions and improvements.

CAPITAL CONSIDERATIONS

Collectively the four transit systems in Berrien have a fleet of 56 vehicles. The majority of the vehicles in this overall fleet are small to medium buses, with seating capacity between eight and nineteen. Transit services are operated through three separate facilities, located in Benton Harbor (TCATA), Berrien Springs (Berrien Bus and Buchanan Dial-A-Ride), and Niles (Niles Dial-A-Ride). Clearly there are many positive impacts to a countywide system related to capital equipment. Single procurement can eliminate administrative duplication and can help achieve to gain economies of scale, i.e. unit costs will be lower for 20 units than four orders of five units.

Some other considerations include:

- A countywide fleet provides the opportunity for greater flexibility in the use of vehicles, a reduction in maintenance costs, and an improved spare ratio.
- There is an abundance of support vehicles including one wrecker, two pickup trucks, and three sedans. This is more than enough and will not need replacing for many years if maintained properly.
- A countywide approach would justify an investment in more advanced technology to improve system performance, safety, and recordkeeping. Fleets of five to ten vehicles cannot gain many advantages from the deployment of more technology, however fleets of 56 vehicles can successfully use this technology to reduce costs.
- One to two transit facilities would be sufficient for operating services in a jurisdiction the size of Berrien County. The Niles Dial-A-Ride and TCATA facilities were paid for with transit grant funds, and are located at opposite ends of the County, so it seems logical that they would serve as facilities for a countywide system. The facilities arrangement is complicated by the planned phasing of countywide services, and therefore will be addressed as any future consolidation efforts occur.

This document provides a conceptual capital improvement plan. Some overall assumptions related to this five year plan for the County include:

- Vehicles currently owned by Berrien Bus would be transferred to the BCTA when it is formed. The BCTA would serve as the applicant for future vehicle purchases.
- If other transit systems join the BCTA their vehicles would also transition to become part of the vehicle inventory, providing greater flexibility in the operation of services. The BCTA would also assume the role as the applicant for future vehicle acquisitions.
- In the short term individual applications to MDOT for technology upgrades would be coordinated between the four systems to ensure future compatibility. Ultimately through a countywide system the BCTA would serve as the applicant.

PLANNING CONSIDERATIONS

One of the most important aspects of a countywide arrangement is the planning and operation of transit services from a broad perspective, as opposed to a piecemeal approach. The ability to plan services throughout the County with one system would improve connectivity, reduce costs, and serve customers'

mobility needs that cross jurisdictional boundaries. Currently there is an overall lack of coherence to the schedules as there are few route level connections. The customers especially lose in this fragmented approach.

Overall components of improved transit service planning through a consolidated effort would involve:

- Consideration of expanded service in the St. Joseph/Benton Harbor urbanized area outside of the Cities of Benton Harbor, Benton Township, and Royalton. The Section 5307 funding formula of TCATA is based off a 45 sq. mi. area with a population of 61,745. TCATA currently serves a 14 sq. mi. area with a population of 24,700. This is dependent on local funding for the service.
- Detailed evaluation of current Dial-A-Ride services to determine increased use of more efficient fixed-route or scheduled services, especially in the Benton Harbor area.
- Assessment of current fixed route services to ensure that routes are serving both origins and destinations, therefore encouraging customers to use these routes as opposed to Dial-A-Ride services.
- Consideration of changes to current TCATA services that allow customers to choose between Dial-A-Ride services and fixed-route services, resulting in the two services acting in direct competition with one another.
- Evaluation of a dispatching system for the TCATA system whereby additional information (i.e. names and phone numbers) is obtained for Dial-A-Ride trips. This process can help institute a meaningful no-show policy where steps or fees are assessed. The no-shows should also be defined to allow customers to abandon their ride if it is very late. The best way to deal with this is to restructure routes and eliminate most Dial-A-Ride.
- Assessment of the Berrien Bus services in and out of the TCATA's service area that is currently complicated for customers. Customers who live in the southern portion of the Benton Harbor/St. Joseph urbanized area are not served by Berrien Bus due to "turf" issues and the fact that most Berrien Bus operating funds come from the FTA Section 5311 grant program for rural transit service.
- Evaluation of improved coordination between providers or improved service planning to provide inter-jurisdictional travel with fewer transfers.

MARKETING CONSIDERATIONS

The primary method used by the four transit systems in Berrien County to market their services is through informational brochures. Each system has a basic brochure that details service areas and fare structures. None of the four systems have a detailed marketing plan. In addition, none of the systems have an independent website, though SWMPC operates a mobility management effort that provides information on the services provided by each system as well as contact information

A countywide transit system provides opportunities to improve customer service and to expand awareness of transportation options through increased access to information. These opportunities include centralized public information, formalized tracking of complaints and commendations, increased on-line information, consistent branding, countywide marketing, and a uniform fare policy.

PROPOSED IMPLEMENTATION PROCESS

This plan provides the basic framework and a proposed timeline for implementing a countywide transit system, and can serve as a guide for future efforts and discussions. Table ES-2 summarizes the key steps

and related activities for implementing a countywide transit system. It is anticipated that while SWMPC led the development of this plan, Berrien County will assume the lead in the formation of the BCTA. The BCTA would then lead efforts to implement a countywide program and to pursue a county millage.

Table ES-3 proposes a timeline for the implementation process along with key activities and actions. While this timeline provides a realistic foundation for future efforts, it will be need to be updated through the various steps based on current conditions and impediments during the process.

Table ES-2: Proposed Implementation Process for Countywide Transit Services

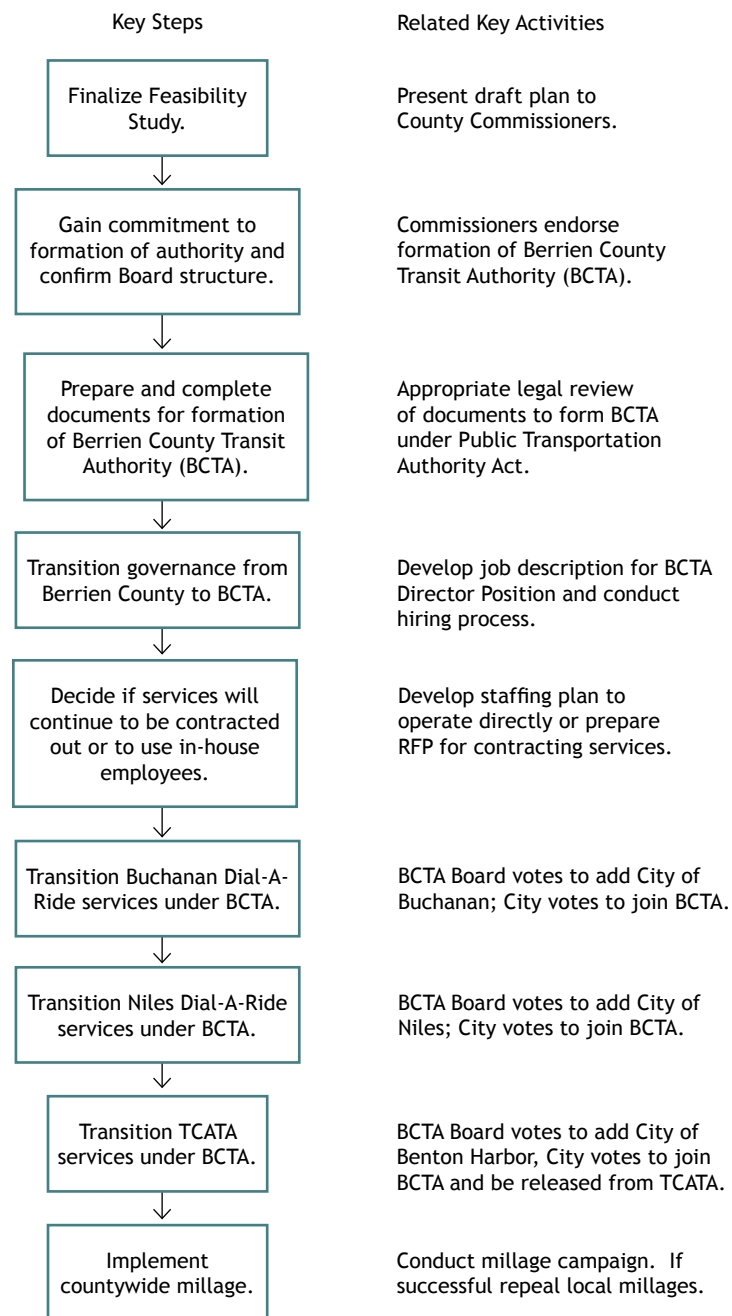


Table ES-3: Projected Timeline, Activities, and Key Actions

Phase 1: Formation of Berrien County Transit Authority (BCTA) and transition of Berrian Bus to BCTA.		
Projected Date	Implementation Activity	Key Actions
April - May 2014	Finalize feasibility study.	<ul style="list-style-type: none"> Present draft plan to Berrien County Commissioners. Finalize report based on input. Develop materials for future presentations as needed to other audiences or local governments.
June 2014 - August 2014	Gain commitment to formation of BCTA and confirm Board structure.	<ul style="list-style-type: none"> Berrien County Board of Commissioners endorses the formation of the Berrien County Transit Authority (BCTA) through resolution. Determine Board representation. Identify and confirm Board members. Draft Articles of Incorporation and by-laws.
August - October 2014	Prepare and complete appropriate documents to form BCTA.	<ul style="list-style-type: none"> Conduct legal review of Articles of Incorporation, modify as needed, and complete. Articles of Incorporation adopted by resolution by a majority of the Board of Directors.
October - November 2014	Hold initial official meeting of the BCTA Board of Directors.	<ul style="list-style-type: none"> Elect officers. Adopt by-laws. Determine appropriate subcommittees. Confirm vision/mission statements and governing principles. Discuss composition of advisory committee. Take any other action the Board deems necessary.
Before October 2014	Extend current contract with TMI.	<ul style="list-style-type: none"> Current agreement between Berrien County and TMI ends on Sept. 30, 2014. Complete extension through Sept. 30, 2015.
November 2014 - January 2015	Hire BCTA Director and begin process for transition from Berrien County to BCTA.	<ul style="list-style-type: none"> Develop Executive Director Position description. Advertise position, conduct interviews. Make offers, conduct hiring process. Begin considerations of marketing campaign to include possible renaming of system. Make necessary preparations for transition. Items include vehicle titles, TMI contract, and accounting and financial systems.
Before October 2015	Determine if services will continue to be contracted out or to use in-house employees.	<ul style="list-style-type: none"> Develop appropriate staffing plan (based on potential structures included in Ch. 3). If in-house services, make necessary preparations to include: <ul style="list-style-type: none"> Develop appropriate employee policies/procedures manual. Develop drug and alcohol testing and training program. If contracted services will continue, begin development of RFP package.
TBD	Implement modifications to current Berrien Bus services.	<ul style="list-style-type: none"> Conduct service planning for shuttle routes proposed in Operations Plan. Develop conceptual routes and schedules. Conduct appropriate community outreach to obtain input on proposed shuttle routes. Finalize shuttle routes and implement. Transition human service contract to shuttles as appropriate. Conduct marketing and outreach.
2016 or later	Move operations center from Berrien Springs to Napier Avenue location.	<ul style="list-style-type: none"> Develop transition plan for moving operations to new location. Depending on status of other transit systems joining BCTA develop facility plan for using all county transit locations as effectively as possible.

Phase 2: Transition of Buchanan Dial-A-Ride, Niles Dial-A-Ride, and TCATA services to BCTA.		
Projected Date	Implementation Activity	Key Actions
TBD	Transition Buchanan Dial-A-Ride services under BCTA.	<ul style="list-style-type: none"> • Gain consensus on Buchanan Dial-A-Ride becoming part of BCTA. • BCTA votes to add Buchanan Dial-A-Ride services. • Buchanan City Council votes to join BCTA. • Develop agreement for City of Buchanan millage funds to be administered by BCTA. • Assess staffing implications and implement modification as needed.
TBD	Transition Niles Dial-A-Ride services under BCTA.	<ul style="list-style-type: none"> • Gain consensus on Niles Dial-A-Ride becoming part of BCTA. • BCTA votes to add Niles Dial-A-Ride services. • Niles City Council votes to join BCTA. • Develop agreement for City of Niles millage funds to be administered by BCTA. • Assess staffing implications and implement modification as needed
TBD	Implement modifications to current Niles Dial-A-Ride services.	<ul style="list-style-type: none"> • Conduct service planning for Niles Dial-A-Ride services as proposed in Operations Plan. • Conduct public outreach process to obtain input on proposed new services. • Finalize services and implement.
TBD	Transition TCATA services under BCTA.	<ul style="list-style-type: none"> • Gain consensus on TCATA becoming formal part of BCTA. • BCTA votes to add TCATA services. • TCATA Board votes to join BCTA. • Develop agreement for City of Benton Harbor millage to be administered by BCTA. • Assess staffing implications and implement modification as needed.

Phase 3: Conduct campaign to implement a countywide millage to support public transit services.		
Projected Date	Implementation Activity	Key Actions
TBD	Develop process and schedule for implementing countywide millage.	<ul style="list-style-type: none"> • Develop conceptual services that could be funded through countywide millage. • Conduct public outreach campaign.

Chapter 1

INTRODUCTION/BACKGROUND

INTRODUCTION

This plan has been prepared for Berrien County stakeholders as the culmination of a transit consolidation feasibility study. It reviews the variety of issues discussed, considered, and analyzed during the project, and serves as a blueprint for future efforts to provide countywide transit services and to improve mobility in Berrien County.

Currently four transit systems operate in Berrien County, the only county in Michigan to have four separate public transit providers. It is also unusual for a jurisdiction the size of Berrien County to have four separate transit systems operating services, and is particularly uncommon in one that features small urban and rural areas—but no large urban areas. The result of having four transit providers operating services in the County is a fragmented system that is difficult for residents to navigate, involves similar administrative functions at multiple systems, and offers various opportunities to use resources more efficiently and effectively.

During the process of the creating the Berrien County Coordinated Transit Plan in 2009 the Berrien County Coordinated Transportation Coalition was formed. Made up of 23 members representing 18 organizations, including transit operators, social service providers, and state and county departments, the goals of the Coalition included:

- Improved coordination,
- Improved efficiencies,
- Improved quality of transportation services,
- Increased awareness of available services, and
- Expanded capacity of human and public transportation services.

The members of the Coalition expressed interest in developing a plan to identify opportunities for integrating and/or consolidating, where practical, transit services in Berrien County. The objectives for this planning effort included:

- Streamlining transit service, simplifying and improving access to transit for riders;
- Achieving service efficiencies and economies;
- Providing a central focus on transit for Berrien County;
- Creating a robust transit system to meet the growing and changing needs of Berrien County residents.

The Case for Consolidation - and the Realities

This plan includes extensive data and information on the four transit systems currently operating in Berrien County. Based on the significant data available for evaluation it is intuitive that consolidation is the most efficient and effective way to provide public transportation in the County. The evaluation demonstrates that from both operational and financial perspectives, there are excellent opportunities for coordination and/or consolidation that would be very beneficial.

But while consolidation is intuitive, there are significant challenges. Often the largest stumbling blocks are institutional and political. Experience indicates that these institutional and political (and sometimes personal) issues must be resolved for meaningful coordination/consolidation to take effect and to benefit the residents of the entire county. While this plan discusses a variety of areas related to improved coordination and options for consideration in implementing a countywide system, in reality moving ahead with any of these alternatives will come down to the actions of local stakeholders and the desire to try new approaches. As discussed with local stakeholders, ultimately for a countywide transit system to be successful in Berrien County, four elements will need to be in place:

1. **Trust and a good working relationship** between the parties involved,
2. **A good business deal** where all parties involved pay their fair share and receive their fair share of service,
3. **Strong leadership** to continue moving the process forward, and
4. **Local control** – In Berrien County, the communities with established services should be able to decide their own fate in regard to transit services in a countywide system.

Vision for Transit Services in Berrien County

With that said, there are numerous transit systems operating as countywide and regional systems throughout Michigan and the country. Therefore, while this plan initially discusses a variety of alternatives that include improved coordination and expanded mobility management efforts that could help to satisfy these four elements, the majority of this document focuses on a larger vision for countywide transit services. Key aspects related to potential countywide services are broken out by chapter, with a review of current arrangements and data followed by discussion of future opportunities. While each of these areas has significant institutional, financial, operational, and logistical aspects or political overtones or impacts, it will provide the foundation for local stakeholders and the local community to embrace new opportunities and implement new arrangements.

While it is recognized that the four transit providers in Berrien County are working hard to provide transportation for County residents, and through appropriate forums are discussing gaps in service, there is no apparent collective vision for transit services. A variety of factors and issues will impact improved coordination of transit services or any potential countywide arrangement, but it is imperative that there is a collective vision in order to provide more efficient and effective transit and to meet existing and unmet mobility needs in the County. A proposed vision that can serve as the foundation for future discussions—and as a reminder when difficult issues are being tackled—is:

The vision for public transit services in Berrien County is a safe, efficient, affordable, and customer friendly system that works to meet the mobility needs of the residents of the County.

Specific components related to implementing this vision are detailed in the following chapters, and in particular the chapters that discuss alternatives in regard to governance, staffing, services, and funding.

Why Implement A Countywide Transit System?

There are compelling reasons for the four transit providers in Berrien County to consolidate services into one countywide transit system. While various aspects related to the decision to implement a countywide transit system are discussed in detail throughout this plan, and many advantages of one countywide

transit system are interrelated, the primary reasons involve:

- Saving money by reducing administrative and management costs through the elimination of duplicative functions such as accounting and finance, human resources, procurement, and grant management.
- Reducing overall operating costs by using one scheduling/dispatch center, handling marketing through one entity, conducting service planning through one office, performing vehicle maintenance through one location, and other operational efficiencies. The overall costs of one countywide service would be less than the sum of the operating costs for the current individual systems.
- Providing seamless connections for County residents between transit services and eliminating the need to pay multiple fares for in-county trips. A countywide transit system would also offer the opportunity for more efficient routing, planning, and scheduling of these services.
- Fulfilling current and future unmet transportation needs by directing cost savings to gaps in current services and establishing an organizational structure that can plan and implement services to support future growth in need for transit services, including the projected increase in older adult and youth populations needing additional mobility options.
- Increasing ridership through a countywide transit system that is easier to understand and to navigate. A countywide system would also be more conducive to an improved marketing and outreach campaign that allows customers to access a single point of contact for information on available transit services in Berrien County, as well as a coordinated fare policy that is easier to understand and is more equitable.
- Increasing funding opportunities, as a countywide system would have the ability to facilitate a possible countywide millage that would support expanded public transit services while reducing the millage rates in jurisdictions that currently have one. One countywide system would also prepare Berrien County in the event that legislation at the state level is approved that reduces funding for counties with multiple transit systems.
- Ensuring more efficient use of resources, including the improved use of current facilities and a consolidated vehicle maintenance management system that uses parts inventories more effectively. Through a countywide system there would also be more effective use of current vehicles and more flexibility in service delivery, as all vehicles would be seen as one fleet and not as separate pieces that cannot be interchanged.
- Providing safer public transit services through a singular uniform training program, use of street supervisors following similar and consistent procedures, and the implementation of a position dedicated to safety and training.

PLAN CONTENTS

This plan is presented in the following order:

This chapter provides an overview of the four transit systems operating in Berrien County, and offers a comparison of how transit services are operated in Berrien County in relation to several other counties in Michigan. This chapter also includes a discussion of key issues, benefits, and opportunities related to a countywide transit system, and a review of stakeholder input that helped guide the study process. The chapter concludes with a discussion of various options to improve transit services in Berrien County, leading to the provision of countywide services that is the focus of the remainder of this plan.

Chapter 2 reviews the current governance structure for each of the four transit systems, discusses possible

governance considerations, and provides a proposed organizational structure with vision and mission statements and oversight board composition.

Chapter 3 provides a review of the administration, management, and staffing of each transit system, and discusses staffing considerations and impacts related to countywide services. It also reviews implications regarding transit services being directly operated or provided through contractual arrangements.

Chapter 4 details the current services provided by each of the four transit systems, provides an existing service review and evaluation, discusses unmet transportation needs in the County, and proposes service improvements. This chapter includes a five year Operations Plan for countywide transit services.

Chapter 5 provides a review of current funding for transit services in Berrien County, discusses millage implications, and proposes budgets for countywide transit service options. This chapter includes a five year Financial Plan.

Chapter 6 discusses capital considerations related to vehicles and facilities. This chapter includes a five year Capital Improvement Plan.

Chapter 7 discusses additional planning implications, including possible future planning efforts and transit connectivity considerations and opportunities.

Chapter 8 provides an Outreach Plan that includes marketing considerations and discusses possible system names and branding opportunities.

Chapter 9 offers a review of overall implementation activities and key decision points moving forward.

Information in this plan was obtained through a variety of efforts during the course of the project, including:

- Meetings with a variety of community stakeholders,
- Meetings and conference calls with the four transit providers,
- Individual interviews and follow-up work with the four transit providers,
- Individual interviews with local stakeholders such as elected officials and representatives from human service agencies,
- Riding the services of each transit system,
- Interviews with transit providers in adjacent areas,
- A review of previous planning efforts such as the Berrien County Coordinated Transit-Human Services Transportation Plan and the Berrien County Transit Study,
- A review of operational and financial data for each of the four transit systems,
- Consideration of case studies of transit consolidation projects from comparable areas of the country for applicability to Berrien County,
- A presentation to a combined Metropolitan Planning Organization (MPO) meeting of the Niles-Buchanan-Cass Area Transportation Study (NATS) and the Twin Cities Area Transportation Study (TwinCATS).

CURRENT TRANSIT SERVICE OVERVIEW

The four transit systems in Berrien County provide a variety of transit services that are discussed in subsequent chapters of this plan, with Chapter 4 specifically detailing current transit services. Table 1-1 provides an overview of these services that includes information on services provided, service area, organizational structures, and funding, as well as data on passenger trips and operating expenses. The service areas for the four systems are also depicted in Figure 1-1.

Comparison to Similar Michigan Counties

It is very unusual for four transit systems to operate services in an area similar to Berrien County. The following section provides a comparison of how transit services are operated in Berrien County in relation to transit services in four other Michigan counties. Data is based on the FY2010 National Transit Database (NTD) and information from the Michigan Department of Transportation (MDOT).

Table 1-2 offers an initial comparison of the systems based on current transit services and the population and geographic size of the county. The primary observation from this information is that in the counties similar to Berrien, especially in terms of population, public transit services are provided through one entity.

Table 1-1: General System Information

	Berrien Bus	Buchanan Dial-A-Ride	Niles Dial-A-Ride	TCATA
Service Overview	Curb-to-curb, advance reservation general public transportation. Rides reserved on first-called/first served basis. Also, provide transportation services under contract for human service agencies.	Same day curb-to-curb service. 24 hour advance scheduling is preferred, but rides can be scheduled up to one hour in advance.	Same day curb-to-curb service. 24 hour advance scheduling is preferred, but rides can be scheduled up to one hour in advance. Also, provide one fixed route.	Immediate response dial-a-ride services and two fixed routes.
Service Area	Census designated rural areas of Berrien County. Therefore, serves geographically the largest area in the County.	Dial-a-Ride services in City of Buchanan and in Buchanan Township. Curb-to-curb same day shuttle service for Buchanan residents to Niles.	Dial-a-Ride service within the city limits of Niles, Niles Township, and Bertrand Township. Fixed route operates between Niles and South Bend, Indiana.	Dial-a-ride services in Benton Harbor, Benton Township, Royaltown, and St. Joseph, serving ~24K people within the urbanized area; the remaining portion of the urbanized area receives service on a limited basis. Red Route serves Benton Harbor, St. Joseph, St. Joseph Township, and Stevensville. Blue Route serves Benton Harbor and Benton Township (Fairplain) retail area.

	Berrien Bus	Buchanan Dial-A-Ride	Niles Dial-A-Ride	TCATA
Service Days/ Hours	M-F 5 a.m. – 5 p.m.	Dial-A-Ride: M-F 7 a.m. – 5:30 p.m. Sat 9 a.m.- 3 p.m. Shuttle to Niles: M-F 4 round trips Sat 3 round trips	Dial-A-Ride: M-F 7 a.m. – 5 p.m. Sat 10 a.m.- 3 p.m. Fixed route: M-F 10 a.m. – 5 p.m.	Dial-A-Ride: M-F 6 a.m. – 6 p.m. Sat 8 a.m.-4:30 p.m. Fixed Routes: M-F 6 a.m. – 10 p.m. Sat 8 a.m.- 10 p.m.
Eligibility	Open to the general public once all agency contract obligations are met.	Open to the general public.	Open to the general public.	Open to the general public.
Annual Operating Expenses (FY2013)	\$1,190,587	\$198,478	\$430,494	\$2,255,067
Annual Passenger Trips (FY2013)	62,477	8,100	31,080	219,167
Fleet Size (Operations)	26	3	6	25
Governance/ Administration	The Berrien County Board of Commissioners oversees and sponsors Berrien Bus. Transportation Coordinator provides daily oversight of contractor and completes appropriate reports. Local Advisory Committee (LAC) meets quarterly and provides feedback on services.	Buchanan City Council provides oversight. LAC meets quarterly and provides feedback on services.	Niles City Council provides oversight. Transportation Coordinator monitors services and completes appropriate reports. Operations Manager supervises drivers and dispatch. LAC meets quarterly and provides feedback on services.	Governed by a board, currently appointed by the Emergency Manager for the City of Benton Harbor on Feb. 14, 2012. Management structure consists of a Director and an Operations Manager who oversee drivers, dispatch, and maintenance. LAC provides board with public feedback on services.
Operations	Berrien County contracts with Transportation Management Inc. (TMI) for operations. The TMI Operations Manager supervises services from the Berrien Bus facility in Berrien Springs. The facility also houses the maintenance shop and vehicles.	As of Jan. 1, 2012 Buchanan Dial-A-Ride has consolidated an agreement with Berrien County to contract services through TMI (previously services were contracted from TMI through a separate agreement)	Beginning in 2011 services provided directly. Previously services were contracted out to a private transportation firm, but decision was made to bring operations in house.	Services are provided directly. Full-time employees classified as operations and do not have supervisory responsibilities are members of labor union.
Primary Funding/ Revenue Sources	- Federal S. 5311 - State operating assistance - Contracts with human service agencies - Passenger fares	- Federal S. 5311 - State operating assistance - City of Buchanan millage - Passenger fares	- Federal S. 5307 and 5311 - State operating assistance - City of Niles millage - Passenger fares.	- Federal S. 5307, 5316 (Job Access and Reverse Commute – JARC), and 5317 (New Freedom) - State operating assistance - City of Benton Harbor millage - Passenger fares

Figure 1-1: Public Transit Service Areas

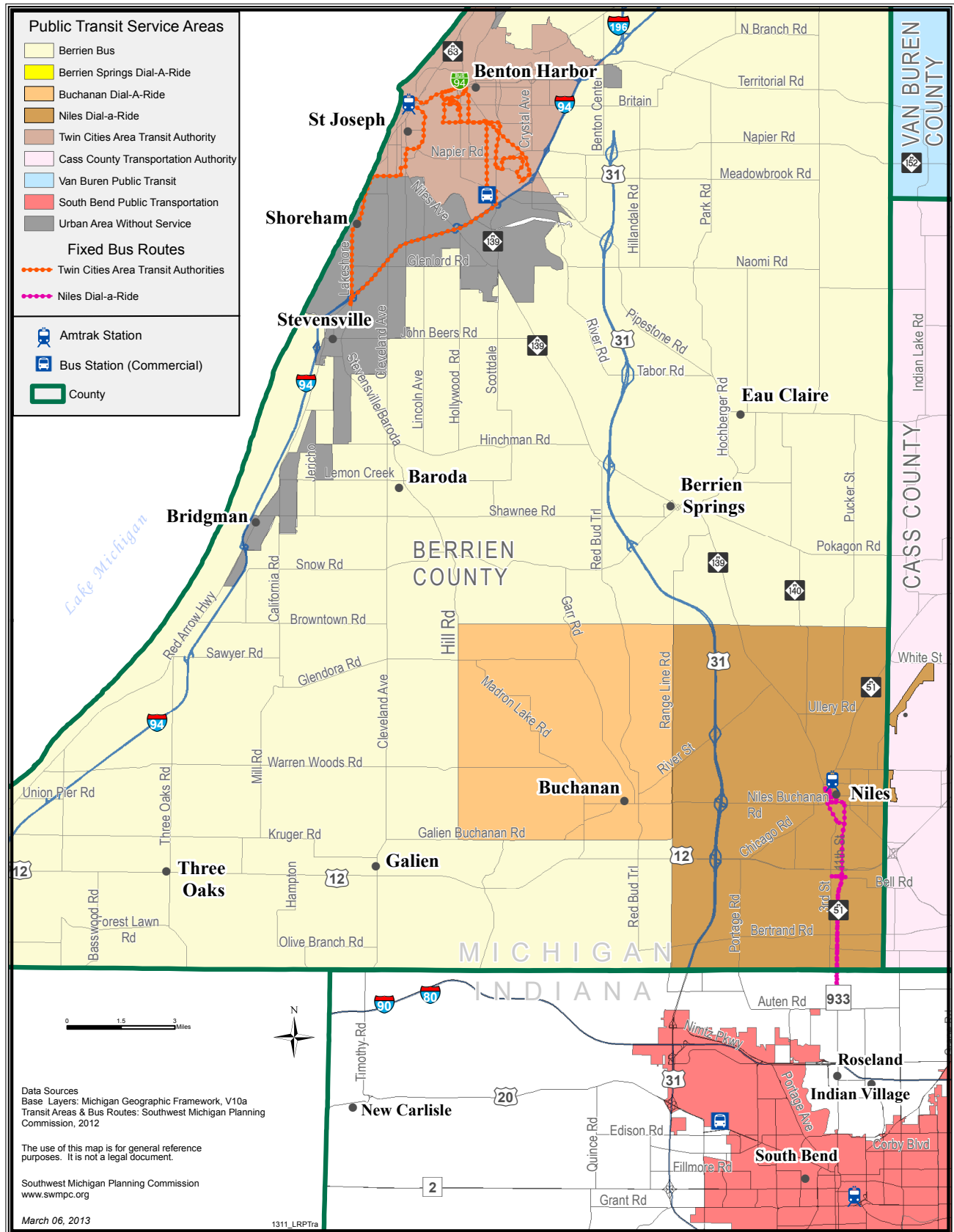


Table 1-2: Comparison of Transit Services in Berrien County to Similar Michigan Counties

County	Population (2010 Census)	Square Miles	Overview of Transit Services
Berrien	156,813	571	Four transit systems operate in the County: -Twin Cities Area Transit Authority (TCATA) operates Dial-A-Ride service and two fixed routes in the Benton Harbor area, -Buchanan Dial-A-Ride provides a demand-response service in the City of Buchanan, -Niles Dial-A-Ride operates demand-response service in Niles and a fixed route to South Bend, Indiana, -Berrien Bus provides demand-response service in the remaining areas of Berrien County.
Jackson	160,248	707	Jackson Transportation Authority (JTA) is the only public transportation provider within Jackson County. JTA provides: -Fixed route bus service in the City of Jackson, -Reserve-A-Ride service that provides door-to-door service to all residents of Jackson County on a first come first served basis, -Paratransit services to work or work training locations for people with disabilities in the City of Jackson.
Livingston	180,967	568	Livingston Essential Transportation Service (LETS) provides general public dial-a-ride service for any destination in Livingston County. LETS also provides transportation to dialysis centers and regional service to Ingham, Genesee, Oakland, and Washtenaw Counties for medical appointments.
Monroe	152,021	551	Lake Erie Transit provides: -8 fixed routes serving the City of Monroe area, -Frenchtown and Bedford area Dial-A-Ride services, -American with Disabilities (ADA) paratransit, -Door-to-door services for older adults and people with disabilities in Monroe County.
St. Clair	163,040	724	Blue Water Area Transit system operates: -7 fixed routes in the City of Port Huron and Fort Gratiot Township, -ADA paratransit, -Dial-A-Ride services in Burtchville, Port Huron, Fort Gratiot Townships, and the City of Marysville, -A shopper shuttle in the City of Port Huron, -A seasonal trolley in the Port Huron area.

Table 1-3 provides additional comparison through the compilation of basic performance numbers for each of the transit systems. This information is not presented to make direct comparisons between services, as each system is unique and definition and calculation of data is often different in different communities. However, this information shows that the trip cost in Berrien County is at the higher end and trips per hour are at the lower end, indicating there is the potential to provide more cost effective and efficient public transit services through one countywide system.

Table 1-3: Basic Performance Measures

	Berrien County (Combined)	Livingston County	Monroe County	Jackson County	St. Clair County
Population	156,813	180,967	152,021	160,248	163,040
Ridership	305,576	116,640	365,361	602,882	1,179,767
Operational Expenses	\$3,810,583	\$2,085,190	\$3,672,758	\$4,274,743	\$8,053,790
Cost per Trip	\$12.47	\$17.88	\$10.05	\$7.09	\$6.83
Trips per Hour	3.86	3.41	7.06	12.00	6.49
Trips per Capita	1.95	0.64	2.40	3.76	7.24
Source: 2010 National Transit Database.					

KEY ISSUES, BENEFITS, AND OPPORTUNITIES

Through the course of the study a variety of issues relevant to a potential consolidation of the four transit systems operating in Berrien County were identified. These issues center around ones inherit with an arrangement where four transit systems operate in a jurisdiction where typically only one system would operate public transit services, and the duplication or disconnect that results from this arrangement. These issues also present potential benefits from a countywide public transit network and opportunities to jump start a more coordinated system in Berrien County in the short-term. While these issues, benefits, and opportunities are further addressed in subsequent chapters of this plan, they center on the following:

- **Jurisdictional Relationships:** It is encouraging that all four transit systems participated in this study. Often though, consolidation efforts can be stymied when it becomes time to make specific and difficult decisions regarding the structure of a lead organization, staffing ramifications, and other vital issues that may be forthcoming. Any consolidation efforts would involve agreement on one wage scale and similar operating policies. Institutional issues and trust issues still need to be worked through.

There is currently partial consolidation of two systems in the County, since both Berrien Bus and Buchanan Dial-a-Ride contract with the same company (TMI) for operation of services—and therefore have the same management and use the same facilities. This provides a foundation for possible interim coordination/consolidation steps.

Coordinating training and maintenance are typically great ways to initiate efforts and build trust between different providers. Opportunities to coordinate maintenance and training can be explored as a short-term strategy. Another short-term strategy would involve coordination of procurement.

Potential governance structures that consider jurisdictional relationships are provided in Chapter 2.

- **Staffing Levels:** Further detailed in Chapter 3, there are numerous positions involved in the management, administration, operations, and vehicle maintenance aspects of providing transit services in the County through the current arrangements. In particular the number of management and administrative positions currently needed to provide services in Berrien County is much greater than would typically be needed for the number of vehicles being operated. The possible savings from reducing management and administrative expenses could then be redirected to greater supervision and safety and/or expansion of services to help meet gaps in public transportation in the County.

A proposed staffing plan for a countywide system, including an organizational chart, is provided in Chapter 3.

- **Local Funding Arrangements:** Local funding arrangements will be an essential aspect of any consolidated or countywide transit effort, and with expansion of services in the County. For instance, the Section 5307 funding formula of TCATA is based off a 45 square mile area with a population of 61,745. TCATA currently serves a 14 sq. mi. area with a population of 24,700. Any expansion of service will be dependent on additional local monies, for example for service in the St. Joseph/Benton Harbor urbanized area outside of the Cities of Benton Harbor, Benton Township, and Royalton. There will also need to be discussion of local millage funding as part of any consolidation effort. The jurisdictions with millages have different rates, and although services are needed countywide, the current millage structure is by local community.

Chapter 5 provides a detailed review of current funding and future opportunities.

- **Marketing and Advertising:** In a county with four transit systems, it is surprising to see the lack of available on-line information on current transit services beyond the Southwest Michigan Planning Commission's (SWMPC) mobility management program. A website through a consolidated system would provide customers with a single point of access on bus routes and other transportation options in the County. In addition, each system now has its own brochures that could be integrated into one ride guide covering all services in the County.

Branding would also be a key part of a potential consolidation by allowing all public transit vehicles in the County to display the same system name and logo. The current situation, with vehicles operating with four different names and markings, only reinforces the disconnect between the systems. Attractive buses, branded with one system name and logo, can be the best marketing for public transit services.

Chapter 8 discusses marketing considerations and presents future opportunities to increase community outreach through a countywide transit system.

- **Fare Integration:** Related to marketing is the need for a consistent fare structure. Currently, each system has its own fare policies, making it difficult for customers to use public transit services in the County. A possible short-term strategy would be coordination on a uniform fare policy that allows customers to more easily use current services.

Chapter 7 provides a review of the 16 different fare structures currently in place in Berrien County and discusses the fare integration issues and considerations through a countywide system.

- **Capital Facilities and Equipment:** As detailed earlier, each system operates its own fleet of vehicles. Cumulatively, there are 61 vehicles overall being operated in the County. A potential consolidation into one fleet would provide an opportunity to ensure that these vehicles are being used efficiently, to determine if the vehicle inventory is appropriate to cover peak periods, and to allow for a singular vehicle replacement schedule. Potential benefits of consolidation of the four fleets into one would be a reduction in short-term capital needs.

Improvements to technology are more worthwhile when done in volume. While it is not practical to secure high end technology for a small fleet of vehicles, it is much more realistic when looking at a collective sum of 61 vehicles operating public transit services in the County.

Chapter 6 discusses capital related issues as part of the Capital Plan.

- **Coordinated Transit Service Planning:** An important component of a more coordinated effort or a full consolidation would be connectivity between the various transit systems to provide customers with the ability to travel throughout the County in a seamless manner. For the most part current transit services are planned and operated independently, there is no service planning conducted at the countywide level, and there is no position at the four transit systems that includes service planning as a component of the job responsibilities. As a result customers may need to use three different systems, and pay three different fares, to travel from one part of Berrien County to another.

Through a countywide system routes can be rationalized and planned as one and a position can be established with job duties that include conducting transit planning and service evaluation. Coordinated service planning would provide the opportunity to conduct detailed evaluations of current dial-a-ride services to determine possible increased use of fixed route or scheduled services. This is especially relevant in the Benton Harbor area where customers can choose between dial-a-ride and fixed route services that in effect are in direct competition with one another. This service planning could also involve assessment of current fixed route services to ensure that they are serving both origin locations (i.e. residential areas) and destination locations (i.e. medical facilities or shopping centers). Possible restructuring of services to increase use of scheduled services would also reduce dispatch staff needed for dial-a-ride services, and help to reduce the current no-show rate.

Other transit planning efforts could include assessment of the Berrien Bus services in and out of TCATA's service area that is currently complicated for customers. Many customers who live in the southern portion of the Benton Harbor/St. Joseph urbanized area call Berrien Bus regularly requesting trips, but these areas are not served since most of the Berrien Bus operating funds come from the Federal Transit Administration (FTA) Section 5311 grant program for rural transit service. Also, initial efforts can involve evaluation of improved coordination between providers to offer inter-jurisdictional travel with fewer transfers. For example, both TCATA and Berrien Bus serve the Orchards Mall—but at different entrances and not on a timed schedule.

Other benefits resulting from coordinated service planning would include having a single transit planning contact in the County. For instance, SWMPC staff now need to work with four systems in regard to service improvements, changing demographics, and land use issues that impact transit planning. In addition, employers, developers, human service agencies, and other key stakeholders would have a specific contact to discuss transit needs and new residential or shopping developments. In addition, MDOT would also have a single point of contact for transit planning in Berrien County.

Chapter 3 provides a proposed staffing plan that includes a position with service planning responsibilities, and Chapter 7 discusses coordinated planning opportunities through a countywide effort.

STAKEHOLDER INPUT

The planning process offered the opportunity for continuous input from the community. This included:

- Discussions at several local meetings,
- One-on-one interviews with the four transit providers and key stakeholders,
- Comments from questionnaires,
- A review of interim documents.

The following provides a summary of the input obtained during the process in regard to the needs or concerns that should be addressed by the plan.

Connectivity

Stakeholders stressed the need for seamless mobility. In addition to improved connectivity between the four transit systems that now operate in Berrien County, stakeholders highlighted the need to connect to other modes of transportation from current bus services. They also noted the need for accommodations for bikes on buses, for bus services that allow customers to access destinations where they can use their bicycles, and the placement of bike racks at bus stops. In addition, there is a need to have transit services connect with the trains that serve St. Joseph, New Buffalo, and Niles to allow access to local hotels and attractions. Stakeholders also mentioned the need to connect transit services with carpool parking lots, as well as the need to connect with services in areas outside the County.

Accessibility

Stakeholders noted the need for all constituent groups to have access to reliable transportation. Specifically, they mentioned the need for greater accessibility at bus stops to allow customers with wheelchairs to board and disembark. There is also a need for more sidewalks and improved pedestrian access to bus stops (including snow removal), as well as improved bicycle access to current bus services.

Service Quality

Stakeholders stated the need for more timely routes and more coordinated services. They noted the need for reliable transit services in order to establish trust with the public. There was also a call for improved scheduling of current services.

Service Design

Stakeholders noted the need for an assessment of the type of transit services that should be in place in various areas of the County to ensure efficiency and effectiveness. While services need to be efficient,

it was also noted that services need to be flexible. Challenges include providing an appropriate level of service in both small urban and rural areas of the County, coordinating public transit routes with human service agency-provided service, and coordinating transit services to provide greater mobility in the County without increasing costs.

Service Expansion

Stakeholders noted the need for expanded transportation services, especially to access jobs beyond current hours of operation. They also noted unserved areas of the County. Stakeholders mentioned the need to plan service improvements in order to meet the mobility needs of the growing older adult population in the County.

Affordability

While noting the need for expanded and more coordinated services, stakeholders expressed the need for services to remain at a low cost to riders. An assessment of the fare structure should be a component of the study.

Turf Issues

Stakeholders noted the possible challenges in coordinating four systems in the County, as well as connecting these services to areas outside the County. In addition, participants expressed concern about an apparent lack of cohesiveness between various communities in the County. There are several governing bodies, and many local agencies that will need to be considered during the study process. Some noted that it was important that the study consider all areas of the County, not just focus on St. Joseph and Benton Harbor.

Marketing

Stakeholders mentioned that public transportation is underutilized, and the need to get people to embrace it as a cost effective environmentally-friendly alternative to cars. This will involve reducing the stigma of riding public transportation through a more effective marketing campaign. In addition, stakeholders noted that services should be better marketed to tourists and other seasonal visitors to the area.

Funding/Sustainability

Stakeholders noted the obvious need for funding to both sustain current service and to expand services to meet additional transportation needs in the County. Some noted that there will need to be discussion about funding so that people in the community are aware that funding constraints will preclude serving every area of the county seven days a week.

REVIEW OF TRANSIT STUDIES AND PLANNING EFFORTS

This study built upon previous and ongoing work in Berrien County. This section provides a compilation and summary of the existing transit studies and transit planning work to date, especially in regard to improve connectivity between the various transit services currently operated in the County.

The Berrien County Public Transit Study

This study was completed in May 2009 by the Southwest Michigan Planning Commission. The study is a comprehensive assessment of current services provided in Berrien County, unmet transit needs and issues, transit resources, and coordination. The study established demographic profiles for each service area, identifying transit dependent populations and assessing how those cohorts were being served by the current services. Transit riders were also engaged in order to provide feedback on services.

The study stated that a major barrier to public transit is the declining supply of operating funds for the transit operators in Berrien County. This has prevented expansion of the service area, created uncertainty over future funding, and forced local governments to make up costs. Rising fuel and utility costs have also created financial pressures on the transit agencies, keeping them from spending funds on marketing and advertising of current transit services.

The Berrien County Coordinated Transportation Coalition was formed out of the process of this study, made up of representatives from social service providers, state and county government departments, and transit operators. The Coalition is continuing to work toward the goals established in this study: 1) Adequately address the unmet/underserved and individualized transportation needs of the targeted populations; 2) Maintain consistency with current federal and state funding requirement; 3) Build and/or increase overall system capacity and service quality; and 4) Leverage and maximize existing transportation funding and capital resources. The strategies that will be used to accomplish the above goals include:

- Establish a structure to build and sustain coordination efforts.
- Raise the visibility and understanding of public transportation services in Berrien County, to support efforts to build both ridership and the local funding base for public transit services.
- Increase efficiency and accessibility with Rural Flex-Route Service.
- Use current demand-response services more efficiently to expand capacity of current services offered to individuals who need human service and specialized transportation by integrating countywide rural service, small urban dial-a-ride services, and fixed route services.
- Make fixed routes more accessible, thereby decreasing rider dependence on demand-response service, by creating a pedestrian- and bicycle-friendly infrastructure that will encourage people to walk and bicycle to transit stops.

The Berrien County Coordinated Public Transit-Human Services Transportation Plan

As noted earlier, this plan was completed in 2009 by SWMPC in cooperation with MDOT's Bureau of Passenger Transportation. The plan consists of an assessment of specialized transportation need in Berrien County and suggests ways in which human service agencies and organizations can coordinate with the local transit providers to better serve persons with disabilities, older adults, and low income populations. FTA requires that projects funded through certain FTA programs are included in a coordinated transportation plan. *More information on FTA funding programs is included in Chapter 5 of this plan.*

This plan suggested five strategies to address the unmet needs and issues regarding specialized transportation in Berrien County:

- Establish a structure to build and sustain coordination efforts.
- Expand outreach to customers, human service agency staff, employers and others, and provide

simplified access to information regarding existing transportation options.

- Expand fixed route public transportation services.
- Use current demand-response services more efficiently to expand capacity of current services offered to individuals who need human service and specialized transportation.
- Improve integration between countywide rural service and small urban dial-a-ride services.

Several projects have been initiated to address these strategies since the development of the plan. The following provides a summary of the projects:

- “Destination Jobs”: This project allowed TCATA to expand fixed route services that provide people with lower incomes in Benton Harbor access to entry level jobs at over 175 targeted employers previously not served by a public transit route. The expanded public transit is located in an area with higher than average poverty and unemployment rates and where individuals rarely have access to a vehicle.
- Early Bird Night Owl Fixed Route Service: Through this project the TCATA expanded its fixed route service hours, improving the availability of transportation to people with low incomes in Benton Harbor. Service hours were increased to operate up to 14 hours a day in order to accommodate those working earlier and later shifts and on Saturdays. The increased hours enable individuals to pursue job training opportunities and to secure entry-level jobs in food service, retail, and lodging.
- Mobility Manager: Through this project a mobility manager position was established at SWMPC. The mobility manager aims to improve transportation services for persons with disabilities, older adults, and individuals with lower incomes by ensuring that human service agencies and transit agencies coordinate transportation resources. Position responsibilities include disseminating information on available transportation services, collaborating with workforce development and human service professionals about their customers’ and clients’ needs, facilitating travel training, and compiling data and information on unmet needs for transportation planning processes.
- Creating an accessible “one stop” website called mywaythere.org was part of the mobility management effort. The website offers consumers and professionals various mobility options and tools for travel within and outside of the region. It also provides a variety of online resources for older adults, people with disabilities, people with lower incomes, and veterans.
- Through the mobility management programs a Reduced Fare Card eligibility program was created and implemented, and is now being used by all transit systems in Berrien, Cass, and Van Buren Counties.

Niles Dial-A-Ride Transportation Development Plan (TDP)

The City of Niles initiated a TDP that was completed in 2012. The TDP provides an analysis of the current Niles Dial-A-Ride service and operations, and includes a variety of options for improving transit services in the Niles area. One of the alternatives included in the TDP focused on the need for enhanced connectivity between Niles and the surrounding communities. This alternative included discussion of a coordinated transit pass that would allow transfers between different transit providers. The Implementation Plan section of the TDP that detailed a project steering committee’s recommendations included a transition to a regional consolidated system with other transit providers as part of Years 4 and 5 (2015-2017). The Niles Dial-A-Ride also included several service expansions that were incorporated into Chapter 4’s conceptual Operations Plan. Specifically, these service improvements involve:

- Expanded hours of operation for demand response (dial-a-ride) services,
- Expanded hours for the Route 2 service, and
- Increased service frequency on the Route 2 service.

Berrien County Master Plan

This plan was completed in 2009 and is intended to guide land use decisions and to provide direction to current and future Berrien County Planning Commissions and Boards with implementation. The transportation section of the plan provides a cursory review of existing services, and notes that a larger organization could have economies of scale in business operations such as accounting and finance, labor relation and employee costs, and purchasing. The Berrien County Master Plan also states that there are benefits to operations such as maintenance, dispatch, and marketing under a single brand.

The Berrien County Master Plan included the results from a community survey. Survey participants were extremely supportive of transit options for riders with few mobility options (87%) and consolidating dial-a-ride services if it resulted in a better performance (76.5%). The overall objectives for transportation in the Berrien County Master Plan included:

- Coordinate, or consolidate if possible, public transportation services to eliminate duplication and provide complete coverage for the County.
- Establish a minimal countywide fixed transit route that provides access to core human services from the other developed areas of the County.
- Continuously evaluate the performance of the multiple transit providers for opportunities that facilitate cost reductions without changing governance models. Streamlined purchasing, branding, and dispatch are primary objectives. Physical consolidations, like maintenance, storage, and dispatch, should occur next, prior to merging governance.
- Investigate opportunities with public and institutional transportation providers that meet the needs of underserved populations or correlate with other goals of this plan, such as providing access to work or recreation opportunities.
- Promote transit for both choice riders and dependent riders. Provide amenities and clean safe vehicles and stops to improve the perception of safety, cleanliness, and convenience.

2040 Twin Cities Area Transportation Study (TwinCATS) Long Range Transportation Plan (LRTP)

The goals and objectives of “What Moves You Berrien County,” the 2040 TwinCATS LRTP, are to guide the development of the 2040 LRTP, the TwinCATS Transportation Improvement Program (TIP), and the overall transportation planning processes in the planning area. The plan includes a chapter on public transit that reviews TCATA services and operating data, and evaluates demographic data including populations considered to be dependent on transit services based on income, age, or disability. The plan notes that current services are primarily provided to meet the needs of these population groups, and public transit in Berrien County is generally not geared toward commuting to work.

The TwinCATS LRTP includes two strategies for improving public transit services in the study area:

- Use current demand-response services more efficiently to expand capacity of current services offered to individuals who need human service and specialized transportation by integrating countywide rural service, small urban dial-a-ride services, and fixed route services.
- Make fixed routes more accessible, thereby decreasing rider dependence on demand response service, by creating a pedestrian- and bicycle-friendly infrastructure that will encourage people to walk and bicycle to transit stops.

2040 Niles-Buchanan-Cass Area Transportation Study (NATS) Long Range Transportation Plan (LRTP)

“What Moves You Berrien and Cass Counties: How will we arrive in 2040?” serves as the 2040 NATS LRTP. The plan provides an explanation of how the communities in the planning area will address their transportation needs, what their priorities include, and how federal, state, and local dollars will be used to address highway, transit, airport, bikeway, and pedestrian walkway infrastructure needs. The plan provides guidance to the area’s local officials as they plan for the present and future development of their communities, and contains the planning framework and other necessary information to assist sound decision-making for the improvement of local transportation systems.

The plan includes a chapter on public transit that reviews Niles Dial-A-Ride, Buchanan Dial-A-Ride, and Berrien Bus services, and discusses demographic data in the study area. The plan notes that a comprehensive effort has been made to understand the current role of public transit and mobility in Berrien and Cass Counties, and that these efforts have included several transit focused studies that called for the establishment of a structure to build and sustain coordination efforts and for improved integration between countywide rural and small urban service. The plan also highlights the need for the evaluation of one consolidated transit system, noting that the four systems may find themselves in a position where the state mandates a consolidation, at which point it would be too late to transition at an orderly, locally-managed pace.

The plan also notes that the two main challenges to the near-term effort for a countywide system are 1) political and the sense of surrendering local authority of the transit system, and 2) system structure and funding, since some of the systems receive local funding from local millages and two of the systems are strictly demand-response while two are fixed route and demand response.

Van Buren Public Transit (VBPT) Study

This study provides an extensive investigation of the VBPT system and its operations, from governance to financial records to performance measures. The study delves into how VBPT fits into the overall transportation system in the county and region. The study also explores the population characteristics of Van Buren County and the potential population sectors that most likely use or would use public transit. Van Buren County’s population is expected to grow and with this growth the need for public transit will also grow. VBPT mostly serves the transportation disadvantaged and will continue to do so.

Part of the focus of this study is to create regional connections throughout southwest Michigan, with connections to Berrien County. Benton Harbor as well as locations along Lake Michigan are nodes that have regional significance to transit customers in the state.

DEVELOPMENT OF OPTIONS

The assessment of current transit services in Berrien County and input from local stakeholders made a strong case for improved coordination or consideration of a countywide system by identifying the:

- Duplication of management and operating staff,
- Costs associated with the duplication—the smaller the system, the higher the costs due to lack of economies of scale,
- Operational inefficiencies due to duplication,
- Poor connectivity for residents due to a lack of coordinated planning, and
- Inequitable and complex fare structures.

Based on the evaluation of current arrangements, it is clear that improved coordination up to implementation of a countywide system is the most efficient and effective way to provide public

transportation in the County. Duplication of management and administration is wasteful and does not serve County residents.

But as also noted earlier, while coordination and/or consolidation would be of great benefit to County residents, there are institutional and political issues that can limit or stop these efforts if they are not resolved. Through the course of the project a variety of alternatives were discussed with SWMPC, the four current transit providers, and local stakeholders. These options ranged from improved coordination through to a countywide system operated by one entity. The following section reviews these opportunities and challenges that provided a framework for discussions with local stakeholders and allowed for a variety of options that SWMPC and local stakeholders could consider. They cover a wide spectrum of opportunities for improving transit services for the residents of Berrien County, falling into the following approaches:

- Improved Coordination
- Expanded Mobility Management Program
- Provision of Countywide Services

The first alternative is the incremental approach, where a menu of coordination activities can be implemented by two or more of the systems. Often consolidation is implemented through this series of steps designed to build trust and to develop working relationships. Clearly, that is one option that can be employed in Berrien County.

Therefore, the first set of alternatives focuses on coordination activities and areas of duplication between the systems where some reduction of costs and/or improvements to service or safety are possible. These successful coordination activities can be designed to lead to consolidation, or can be stand-alone activities designed to improve service and safety, or to reduce costs. In these scenarios, the various transit systems would work together in a number of areas that involve:

- Non-threatening efforts that promote trust,
- Identifying areas to reduce duplication of effort or function,
- Assessing opportunities to improve connectivity between services,
- Coordinating training programs, and
- Coordinating vehicle maintenance.

The next alternative is to expand mobility management efforts in Berrien County. The current mobility management program provides a forum for the four transit providers to discuss a range of issues, and is working to improve mobility in the County by:

- Building awareness of transportation options in the County,
- Improving marketing of current services,
- Serving as a one-stop transportation information clearing house for social service providers and other key stakeholders in the Southwest Michigan region,
- Conducting education and outreach trainings and workshops for human service agencies, and
- Facilitating meetings of the Berrien County Coordinated Transportation Committee (BCCTC).

Tied with improved coordination efforts, but short of a countywide system, an expanded mobility management effort can be implemented that builds upon these efforts and improves access to information on transportation options and can serve as a structure for continued work towards a countywide arrangement.

The third set of alternatives reviews the variety of considerations related to a countywide system. Particular focus is on the various organizational alternatives that SWMPC and local stakeholders can discuss and consider for leading a potential countywide transit system. This section also includes proposed “guiding principles” that can serve as the foundation for discussions that are integral to any transition to a countywide network. Based on discussions with local stakeholders, these options can be divided into short-term, mid-term, and long-term incremental steps (and can be based on the first set of coordination alternatives).

The alternatives present the benefits of each potential option along with possible disadvantages. Impacts, both from a cost perspective and from a qualitative aspect, are noted. In addition, the options include specific decision points where there will need to be agreement between SWMPC, the four transit providers, and key stakeholders to move forward and improve coordination efforts, expand mobility management efforts, or implement a countywide system.

IMPROVED COORDINATION

This section provides a review of various coordination alternatives. The first group of alternatives includes activities that can eliminate duplication of administrative and management functions. The second group of coordination alternatives includes those related to service planning (finding ways to seek greater connectivity) and scheduling/dispatching.

While these alternatives can be considered stand-alone options, they can also serve as a path to a countywide structure. Very often, coordination needs to start small and build relationships and trust. There are a number of coordination activities that are non-threatening, non-controversial, simple to implement, and can reduce duplication and save money.

Management and Administrative Activities

Driver Training

Training is an area that offers coordination opportunities that can be implemented in the short-term and can lead to (but does not have to include) consolidation. Currently each system conducts its own training, not allowing for economies of scale that can occur through the training of more than one or two persons at a time. In addition, despite the number of management and administrative staff between the four transit systems, there is no one position dedicated to safety and training.

A forum can be arranged for providers to discuss current training programs and how they can coordinate most, if not all training. This discussion can then lead to agreement on consistent training level standards or guidelines. In this alternative, one entity would conduct the majority of the training for all operators working under the direction of the consortium of providers. In addition, drivers from human service agencies and other organizations that provide transportation can be invited to attend the training. Training specific to a system would still be conducted internally.

Benefits

- Ensures consistent training approach and confirms that transit drivers in the County—no matter the system—have similar certifications and level of training.
- Reduces duplication of effort and costs associated with separate training programs. Makes more efficient use of training sessions by having the maximum number of participants at each event.
- Ensures a higher quality of training by using trainers, which is much more effective than placing trainees in front of videos.

Disadvantages

- Requires changing the way things are currently done.

Cost Benefit and Impact Considerations

- Coordinated training would reduce administrative time spent scheduling and conducting training sessions, and the economies of scale would allow for a small cost savings.
- The quality of the training will be enhanced while costs are reduced. This could have a significant impact on safety.

Decision Points

- A lead agency will need to arrange for appropriate meetings of providers to discuss coordination opportunities and maintain a training calendar.
- One agency would take on the lead training role with the consortium of operators directing the effort.
- Transit systems will need to agree on a consistent training program and guidelines.

Vehicle Maintenance

Vehicle maintenance in Berrien County is currently conducted at three locations, with the only coordination occurring between Berrien Bus and Buchanan Dial-A-Ride since both services are contracted through the same provider. In addition, while TCATA has a maintenance facility, all preventative maintenance and repairs are contracted out. Therefore, while typically vehicle maintenance is an area where coordination can initially occur before any full consolidation effort, the various ways that each system maintains their vehicles makes this coordination more challenging and the benefits may not be realized unless there is a consolidated entity.

Benefits

- Provides opportunity for one position to coordinate fleet maintenance countywide, reducing duplication that currently exists with positions at three systems overseeing vehicle maintenance activities.
- Offers the opportunity to take advantage of possible economies of scale when working with vendors for parts or when contracting out specific repairs.

Disadvantages

- There may be an increase in vehicle miles to transport vehicles from a central maintenance facility to the vehicle's local area of service.
- Requires changing the way things are currently done.

Cost Benefit and Impact Considerations

- By eliminating duplication and underutilization of space, tools, and personnel, costs can be reduced by up to 25%.¹
- Provides opportunity to improve maintenance practices by having one entity coordinate maintenance.

Decision Points

- A lead agency will need to arrange for appropriate meetings of providers to discuss coordination opportunities and the appropriate use of current facilities.

Procurement

Procurement is also an area where initial coordination efforts can precede broader consolidation efforts. Typically this coordination allows systems to obtain products or services at a lower price based again on economies of scale or by “piggybacking” on existing contracts.

As some local stakeholders have noted, the coordination of procurement may not result in these benefits in Berrien County, since two of the systems (TCATA and Niles Dial-a-Ride) report directly to the FTA and follow FTA procurement guidelines not MDOT procurement procedures. These systems therefore are bypassing the state review process, and since this may add time to any procurement process, there is little incentive for these systems to participate in joint procurements. Limited benefits may result unless a countywide structure is in place. However, at the minimum there should be continued discussions regarding possible coordination of procurement activities. This could include having one of the direct FTA recipients handle procurement practices and allow the other systems to coordinate with them.

Benefits

- Provides opportunity for one office to facilitate procurement processes countywide, reducing duplication that currently exists with positions at multiple systems handling procurement activities.
- Offers the opportunity to take advantages of possible economies of scale when working with vendors or contracting for services. May offer the opportunity to lower fuel costs through a greater purchasing amount through a coordinated effort.
- May help ensure standardization of technology, vehicles, and equipment.

Disadvantages

- May be more feasible as part of a countywide system that allows for implementation in conjunction with decisions related to organizational structure.
- Different procurement guidelines between the four transit providers would need to be addressed for any coordinated effort.

Cost Benefit and Impact Considerations

- Joint purchasing typically reduces prices for purchases up to 15%.²
- Reduces need for staff of four different systems to be involved in procurement activities.
- Appropriate bookkeeping and policy procedures would need to be put in place to combine procurements.

Decision Points

- A lead agency will need to arrange for appropriate meetings of providers to discuss opportunities to conduct joint procurement.

Transit Service Planning/Improved Connectivity

A variety of transit services are currently operated in Berrien County, for the most part independent of each other. While service planning is coordinated between Berrien Bus and Buchanan Dial-A-Ride, there appears to be limited coordinated planning efforts between all systems. Greater coordination of service planning efforts can lead to improved linkages between services at major activity centers through additional transfer locations that will expand mobility options for the residents of the County. Coordination of service planning also allows for discussion of the various fare structures and fare policy issues that impact connectivity between services.

The BCCTC provides a forum that allows transit providers to meet and to report on any new services or changes to current services, and has helped to improve coordination of some policies and procedures. These meetings have also provided the opportunity for more extensive service planning discussions to identify and discuss opportunities to improve connectivity between the various systems. However, services are currently still planned and evaluated independently, and customers must still use multiple systems and pay multiple fares for some in-county trips.

Looking more long-term, the County can undertake a Transit Development Plan (TDP) process through a countywide perspective. The last time a countywide plan in regard to transit services was undertaken was by SWMPC in 2009. While the City of Niles recently completed a TDP, this plan addressed the Niles system and only slightly referenced the countywide transit perspective.

Benefits

- Improved coordination of service planning can help to improve connectivity between systems, expanding mobility options for County residents.
- Coordination of service planning can be implemented immediately, and can offer immediate results.

² Ibid.

- A countywide TDP process would ensure that services are reviewed in a holistic manner.

Disadvantages

- Requires institutional change in that the systems will need to embrace possible changes to current services to improve connectivity.

Cost Benefit and Impact Considerations

- Additional staff time would need to be devoted to joint service planning meetings and discussions; however the result could be more cost efficient services.

Decision Points

- Short-Term: Agreement between transit providers to use current BCCTC meetings as a forum to conduct more extensive service planning efforts and to discuss opportunities to make changes that would allow greater connections between systems.
- Mid-Term: Evaluation of dial-a-ride services and consideration of more fixed route and scheduled services.
- Long-Term: Development of a countywide TDP.

Dispatching/Scheduling

Other than the coordination between Berrien Bus and Buchanan Dial-A-Ride, services are scheduled and dispatched from different locations and without any dialogue between providers. Therefore, this is an area that can greatly benefit from improved coordination. One center could handle the dispatching and scheduling of services for the entire County, as opposed to the three offices that currently exist.

Benefits

- Ensures consistent procedures for the scheduling of trips and the dispatching of vehicles, as opposed to a current process that is unique to each transit provider.
- Ensures more efficient use of technology to schedule trips, oversee drivers, and manage vehicle use. A consolidated system means a larger fleet of vehicles that can take advantage of quality technology and can use it effectively, and also provides the economies of scale needed for consideration of technology advancements in the future.
- Reduces duplication of dispatch staff by consolidating positions currently engaged in the same job responsibilities. Savings can then be used for other positions (i.e. driver training) or expanded services.

Disadvantages

- The three offices that currently dispatch and schedule trips in a different manner would need to combine into one with consistent procedures and technology.
- Dispatch staff may need additional training to oversee countywide services as opposed to one that only serves a jurisdiction.
- Communication technology would have to be coordinated.
- Requires institutional changes to move forward.
- May be more feasible as part of a consolidation effort in regard to staffing and the use of existing facilities.

Cost Benefit and Impact Considerations

- Reduction in dispatch staff through a coordinated effort can typically lead to up to a 25% savings in dispatching staff wages.³

³ Ibid.

Decision Points

- There would need to be detailed discussion regarding the feasibility of coordinating dispatching and scheduling of trips into one location.
- There would need to be an agreement on the location of a coordinated dispatch center.

EXPANDED MOBILITY MANAGEMENT PROGRAM

One of the functions of the current mobility management program hosted by SWMPC is to facilitate meetings of the BCCTC. The mobility management program could continue to take a lead role and build upon previous and current efforts to facilitate discussions regarding the coordination options described in the preceding section.

Looking beyond improving coordination efforts, but short of any countywide transit structure, is the possible expansion of the current mobility management program to serve as a greater one-stop location for residents to access information on transit and other travel options in the County. As part of mobility management activities, many communities are implementing “one call–one click” services that provide customers with a single point of contact to learn about available transportation resources. This approach is especially useful in an area with multiple transportation providers.

While this arrangement would not solve the service disconnect and other issues related to having four transit systems operating in the County, it would be more customer-friendly than the current one that involves customers calling multiple systems to obtain information. It would also take advantage of the current efforts of the mobility manager housed at SWMPC, who is working with transit providers and conducting outreach in the Berrien County community. In addition, this mobility management approach provides the structure to implement a variety of services—such as travel training—to assist residents in using current transportation services.

Benefits

- Provides customers with a single point of access to gain information on available transportation services.
- One click option provides customers with access to information 24/7.
- Offers a non-threatening activity that improves information access to services in the County.
- Makes use of available funding through FTA.
- Consistent with national emphasis on mobility management efforts.
- Can provide the foundation to go beyond four transit providers and expand opportunities to bring human service transportation providers and private transportation operators into coordination and mobility management efforts.
- Can be implemented in conjunction with efforts by the Michigan Public Transit Association (MPTA) to establish regional mobility management programs as part of a statewide Non-Emergency Medical Transportation (NEMT) system.

Disadvantages

- Does not address the fragmented transit structure in the County. Customers would still need to use multiple systems for in-county trips.
- As opposed to an impartial organization, it may be seen as an unneeded middleman (and so it may be best for a transit system to house the one call-one click service).
- Some functions beyond information and referral may hinder and not facilitate coordination or countywide transit efforts. For example, joint dispatching or scheduling may cause communication breakdowns when reservations are handled separately or requires customers to know two telephone numbers (one for reservations and a separate number for real time needs such as where is my ride calls and cancellations).

COUNTYWIDE SERVICES

While there would be benefits resulting from improved coordination and an expanded mobility management program, and these steps may be necessary to provide the foundation for further efforts to improve mobility in Berrien County, they fail to address the core issue—disconnected and duplicative transit services. *Therefore, the remainder of this plan is devoted to the provision of countywide transit services. The subsequent chapters discuss various alternatives related to provision of countywide services, and where appropriate provide a vision for what countywide transit services could look like—especially from the governance, service, and funding standpoints. The benefits and disadvantages of various options are also discussed in the respective chapter.*

This section begins with proposed principles to help facilitate consideration of the various options.

Guiding Principles

The provision of countywide transit services is an alternative fraught with political ramifications, institutional implications, and significant change from the way things have done in the past. It is understandable that while some stakeholders in Berrien County are excited about the possibilities of a consolidated countywide transit system, others would be apprehensive about the impact this arrangement would have on local control or jobs. There appears to be conceptual consensus that a countywide system is needed. However, recognizing apprehension and concerns expressed by some stakeholders, the planning process included discussion of the following proposed principles to help facilitate consideration of the countywide transit service option:

- **Governance.** The governance of the system must be equitable among the local partners.
- **Funding.** Similar to governance, local partners must feel that for any funding they are contributing for a countywide system, they must be receiving appropriate service (so called “bang for their buck”).
- **Costs.** The costs to operate one countywide system must be the same or lower than the costs that are currently incurred to operate the four local systems.
- **Service.** The level of service provided in each of the participating jurisdictions must be equivalent or better than the services currently provided by the four local systems.

OVERALL ASSESSMENT OF OPTIONS

Table 1-4 provides a review of the potential impact these options would have on various aspects related to the provision of transit services in Berrien County. Table 1-5 then provides a review of areas of these options related to their acceptability, especially by key stakeholders. While this rating system is subjective and is designed to be a part of an overall assessment of options, not surprisingly these tables point out that the countywide services alternative has the potential for the most impact on services and it also has the most variance related to acceptability.

Table 1-4: Potential Impact of Options

4 = Significant Impact Anticipated,
 3= Some Impact Anticipated
 2= Little Impact Anticipated
 1 = No Impact Anticipated

	Improved Coordination	Expanded Mobility Management Program	Countywide Services	Comments
Provide More Efficient Public Transit Services, Improve Productivity, and Increase Ridership	3	2	4	A countywide system would streamline operations and vehicle maintenance, allow greater flexibility in the use of available vehicles and resources, and ensure services are planned as one and adjusted appropriately to meet need and demand.
Provide More Cost Effective Public Transit Services	3	2	4	A countywide system would reduce management and administration costs and eliminate duplicative functions.
Improve Connectivity Between Various Services	3	2	4	A countywide system would be more convenient for customers and easier to understand and navigate. Appropriate connections can be planned and implemented since routes and services would be viewed in a holistic manner, helping to ensure more seamless services.
Improve Integration of Various Fare Structures	3	1	4	Through a countywide system a more equitable fare structure can be established, and appropriate fares to transfer between different services can be implemented.
Improve Public Understanding of Available Transit Services	2	3	4	While an expanded mobility management program would help to ensure County residents were aware of the services, these services would still be disconnected. Under one countywide system services would be planned and marketed as one.
Increase Service to Meet Unmet Transportation Needs	3	2	4	A countywide system would reduce duplication of administrative and management functions and enable cost savings that could be used to expand services to meet needs and fill gaps. Consolidated service planning would allow a broader view of services and the opportunity to meet unmet needs through current resources.
Improve the Use of Technology	2	2	4	One countywide system provides the opportunity for a consolidated procurement process for new technology. In addition, more advanced technology to improve system performance, safety, and record keeping can be justified through a larger consolidated countywide fleet.

	Improved Coordination	Expanded Mobility Management Program	Countywide Services	Comments
Enhance Use of Current and Potential Funding Sources	2	2	4	Through one countywide system little would change to the current funding sources, as these sources would transition to a new countywide structure. It would, though, prepare the County in the event legislation being considered at the state level (discussed in Chapter 5) is approved that would reduce funding to jurisdictions with multiple transit providers. In addition, it would provide the opportunity to implement a countywide millage to support transit services.

Table 1-5: Potential Acceptability of Options

3 =Very Favorable Response Anticipated

2 = Modestly Favorable Response Favorable Response Anticipated

1= Possibly Unfavorable Impact Anticipated

	Improved Coordination	Expanded Mobility Management Program	Countywide Services	Comments
County Residents	2	2	3	While improved coordination and an expanded mobility management program would make it easier for County residents to use public transit services, it is anticipated that the ability to contact one system for information and to use seamless services through one provider would be well received.
Elected Officials	3	3	2	Improved coordination and expanded mobility management would require little attention by local elected officials. Conversely, a countywide system that involves formation of a new governance structure will require elected official involvement, and consideration of changes to the current institutional arrangements that may prompt some hesitation.
Current Staff of Existing Transit Providers	2	3	1	Improved coordination means a change in current arrangements that some current staff may resist. Some staff may be concerned about how a countywide system would impact their current job.

	Improved Coordination	Expanded Mobility Management Program	Countywide Services	Comments
Human Service Agencies and Other Community Stakeholders	2	2	3	While expanded coordination and mobility management efforts would help to improve current services, community stakeholders—especially those with human service agencies representing people with disabilities, veterans, older adults, and people with lower incomes—strongly expressed a need for one transit system that enables greater mobility throughout Berrien County.
MDOT	2	2	3	Currently MDOT processes funding applications and reports from four different transit providers in the County. Therefore it is anticipated that one countywide system would be well received at the state level. In addition, it would also ensure that MDOT has a single point of contact for transit planning and administration in the County.
Metropolitan Planning Organizations/Community Planners	2	2	3	Currently the Metropolitan Planning Organizations located in the County (TwinCATS and NATS) must work with multiple systems in regard to service improvements, changing demographics, and land use issues that impact transit planning. In addition they must work with multiple providers in regard to projects that need to be included in Transportation Improvement Programs (TIP) administered by the MPOs. Therefore it is anticipated that a countywide system with one contact for planning would be well received.
Economic Development Officials, Employers, Developers, etc.	2	2	3	Local officials and staff, employers, developers and others who work with economic development efforts currently have to work multiple transit systems. Therefore it is anticipated that a countywide system with one contact would be well received since they would have a specific contact to discuss transportation needs as well as new residential, commercial, or shopping developments (that should include input from a transit perspective at the outset).

Table 1-6 provides additional details on the potential impacts of a countywide transit system structure, and provides the foundation for discussion of the various elements related to such a structure throughout the remainder of this plan. These impacts are discussed in both qualitative and quantitative terms. While the quantitative impacts are usually of paramount importance, there are other factors that local stakeholders must consider.

Table 1-6: Countywide Structure Impact

Countywide Services Aspect	Qualitative Impact	Quantitative Impact
Staffing	<p>A process would need to be established for current employees to transition to a new countywide entity or to apply for positions at the new countywide system.</p> <p>Job descriptions, pay scales, benefits, would need to be developed and approved by Board that will oversee countywide system.</p>	<p>While a projected staffing plan for a countywide system will need to be discussed and endorsed by local stakeholders, a conceptual budget for a countywide system through one entity shows a possible reduction in overall expenses.</p>
Regulatory (i.e. drug and alcohol testing, CDL requirements, ADA, etc.)	<p>Regulatory burden will be minimized as one entity will take the place of four. As opposed to separate systems conducting drug and alcohol testing system, ensuring compliance with federal civil rights requirements, etc., one administrative staff would handle.</p> <p>Driver training can be consistent ensuring that the countywide system complies with the ADA and other regulatory requirements.</p> <p>Additional ADA paratransit services may be needed if more fixed routes services are implemented as part of countywide structure. But a consolidated fleet would provide greater flexibility in the use of vehicles and allow for use of appropriate vehicles to operate ADA paratransit services.</p>	<p>Some administrative savings would be seen since all regulatory requirements would be administered by one entity.</p> <p>For conceptual budget purposes, if four systems are currently handling a regulatory responsibility the projected amount was one fourth of current expenses; if handled by three it was projected at one third.</p>
Funding	<p>Federal: Countywide system would utilize a combination of the current rural and small urban funding that currently flows to four separate jurisdictions.</p> <p>State: Eliminates the need for separate applications to MDOT. Countywide system would use state funds that currently flow to four different systems.</p> <p>Local – Millage: Countywide millage would be the most effective and equitable way to fund the local portions of the service and ensure equitable distribution of services. In lieu of countywide millage, areas providing millage or local funding would receive expanded services over the base level of service countywide. Therefore, while a consolidated, countywide system would work best with a countywide millage it could begin with a fragmented millage structure. As funding/countywide millage becomes available the Board can revisit the equity issue.</p> <p>Local – Contracts: Berrien Bus currently relies on contracts with agencies to provide needed revenue for the system. These contracts can continue through a county-wide system to assist with local match requirements and to ensure coordination of services.</p>	<p>While the state legislature has not passed legislation that would reduce funding for counties with multiple transit providers by 10 percent, there is strong sentiment that it will eventually be approved. Implementing a countywide system would ensure that this funding reduction would not take place.</p> <p>Some administrative savings would be seen as a countywide system would eliminate the need for separate applications and reporting to MDOT.</p> <p>There would be administrative costs related to the process in arranging for a countywide millage vote, advocating for support for the millage, and if successful transiting from the local millage system to the countywide one. In the long run, administrative expenses could be reduced since multiple jurisdictions would not need to go through this process.</p>

Countywide Services Aspect	Qualitative Impact	Quantitative Impact
Customer Service	<p>Customers would be able to access countywide transit information via one telephone number as opposed to four.</p> <p>Public information (i.e. brochures) would be combined so that customers who need to travel across the County could employ one schedule as opposed to at least two sets and sometimes as many as four.</p> <p>More advanced centralized website can be implemented that provides information on services and schedules, with capability for future on-line trip planner function.</p> <p>A countywide system would allow the implementation of an integrated fare structure that would reduce the number of fares that customers need to understand or the number of transfer they need to make.</p> <p>Complaints and commendations can be more formally tracked by staff at one location as opposed to current informal process conducted by various staff at each of the three operators.</p>	Some administrative savings would be seen through reduction in customer service staff, one phone system as opposed to three, etc.
Operations	Routes and services can be planned and operated as one, as opposed to four separate systems. Countywide structure would provide the ability to operate all services directly or continue to contract some services. Provision of services through a third party contract would require compliance with appropriate federal requirements, including ensuring compliance with the 49 U.S.C. S. 5333(b) (often referred to as –13(c)).	Providing transit through one countywide system would provide opportunity to reduce operating expenses due to economies of scale, coordinated service planning, and management of operations through one central office. These operating expenses include fuels, tires, general maintenance, and other materials and supplies.
Capital	<p>Vehicles: Countywide structure The consolidation of vehicles into one system will allow full use of all vehicles A consolidated fleet, including vehicle use flexibility, reduced maintenance costs, common fleets.</p> <p>Technology: Countywide structure would justify greater investments in more advanced technology to improve system performance, safety and recordkeeping.</p>	Countywide structure would allow for a full vehicle replacement plan. Single procurement can be conducted to gain economies of scale (i.e. per unit costs will be lower for 20 units than four orders of five units).
Facilities	Countywide services through one entity would require decision on use of current facilities. Services could be provided using one central location such as the current TMI location in Berrien Springs. This would also necessitate continuation of contracting services. The other option is to use the existing TCATA and Niles facilities.	Providing transit services using two facilities has the potential to reduce costs such as utilities by one third. The use of once central facility could reduce this cost more, though saving may be lost in the need for vehicles to travel further distance to serve certain areas of the County.

Chapter 2

GOVERNANCE CONSIDERATIONS AND PREFERRED STRUCTURE

This chapter reviews the current governance structures for the four public transit systems operating in Berrien County, and discusses the structures that could be employed as part of consolidation efforts or in the provision of countywide transit services. The options and alternatives presented in this chapter resulted from research of other transit systems in Michigan and across the country that are governed by an authority or similar structure, and from discussions with SWMPC and the four systems. The initial research and discussion culminated in interim documents that were reviewed by these project advisors, and their input and comments are incorporated into the governance considerations included in this chapter.

After review and discussion of these options, this chapter presents the project advisory committee's preferred structure—a new County transit authority that would assume the current Berrien Bus operations, and serve as the a foundation for future coordination/consolidation efforts. This chapter therefore focuses on the issues and factors related to such a structure, a proposed Berrien County Transit Authority (BCTA). Much of this chapter relates to the governance implications of establishing this authority, an area that will need the most attention initially. However, this chapter also discusses other short-term and long-term impacts that would result from the creation of the BCTA.

The discussion of the current governance structures includes organizational charts for each system that detail present positions within each. A proposed organizational structure for the possible BCTA is included in the next chapter that presents a staffing plan.

Current Organizational Structures

For the most part, the four transit systems operating in Berrien County operate independent of each other from an organizational standpoint. The only exception is that both Berrien Bus and Buchanan Dial-A-Ride services are contracted through the same provider (TMI). Still, each system has its own organizational structure and administrative staff. The following section provides an overview of the organizational structure for each transit provider in the County.

TCATA

TCATA has authority under the State of Michigan Mass Transportation Authorities Act, which allows any city having a population of not more than 300,000 to incorporate a public authority. TCATA is governed by a six person Board of Trustees including the Executive Director of TCATA. The TCATA Board of Trustees meets every month to develop policies for the transit authority. The Board is supported by a Local Advisory Committee (LAC) that provides public feedback about the system along with action items to support recommendations. The purpose of the LAC is :¹

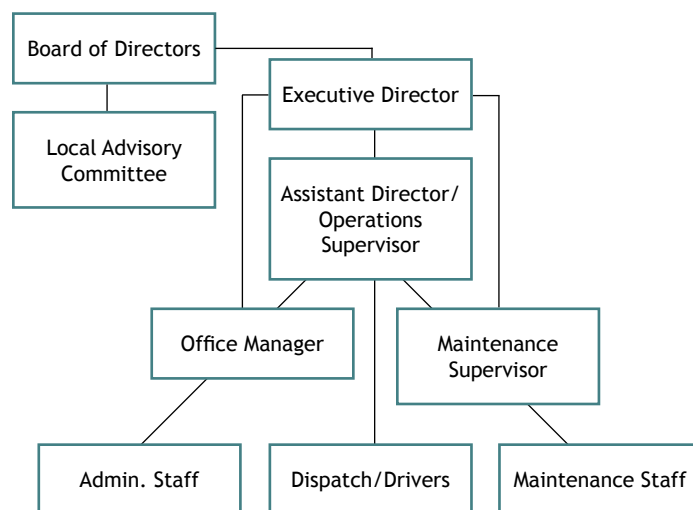
1. To provide input, review, and comment on the Vehicle Accessibility Plan as required by MDOT.

¹ Source: Go RideShare website administered by SWMPC.

2. To generate discussion, interpretation, and recommendations to the Board regarding any senior adults and persons with disabilities related issues of a significant nature.
3. To work with TCATA staff as directed by the TCATA Board toward the achievement of the organization's goals and objectives.
4. To report regularly to the TCATA Board of Directors the activities, actions, and recommendations of the Council.

The TCATA management structure consists of a Director and Assistant Director. The role of the Director is to manage operations through the Assistant Director and attend to all external duties regarding the agency. The Assistant Director is responsible for internal duties at TCATA that include staff management, disciplinary responsibilities, staff scheduling, administrative management, and customer complaints. The drivers, dispatchers, maintenance personnel, and office managers all report to the Assistant Director. Currently there is no Operations Supervisor or Maintenance Supervisor at TCATA. Administrative staff report directly to the Office Manager. The TCATA organization chart is shown in Figure 2-1.

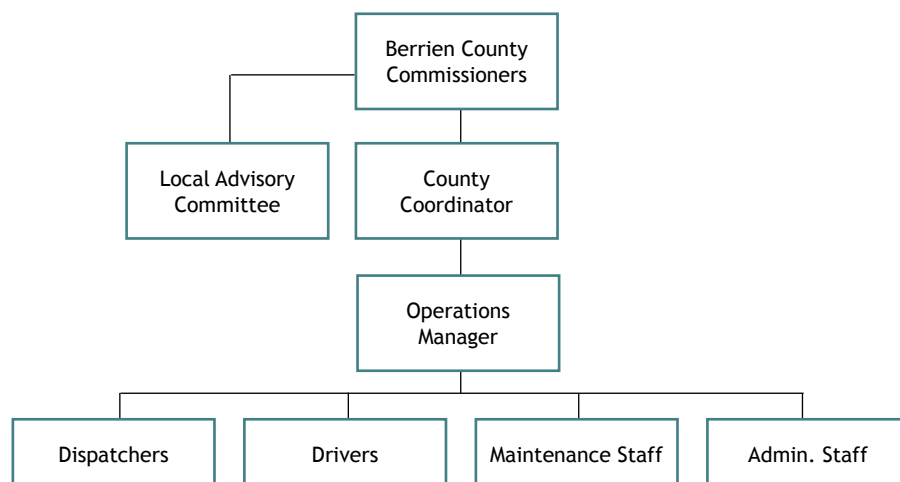
Figure 2-1: TCATA Organizational Chart



Berrien Bus

Berrien Bus is organized under the State of Michigan Revenue Bond Act which allows for public corporations to make public improvements including public transit systems. The Berrien County Board of Commissioners acts as the Board of Directors for Berrien Bus. The Board holds regular monthly meetings, which are open to the public. The Board is supported by a LAC (separate from the TCATA LAC) which meets on a quarterly basis and provides feedback and recommendations about Berrien Bus service. The Berrien County transportation coordinator reports monthly ridership, revenues, expenses, and performance indicators. Services are contracted out to TMI, which has a management staff that oversees dispatch, drivers, maintenance, and administrative personnel. The Berrien Bus organization chart is shown in Figure 2-2.

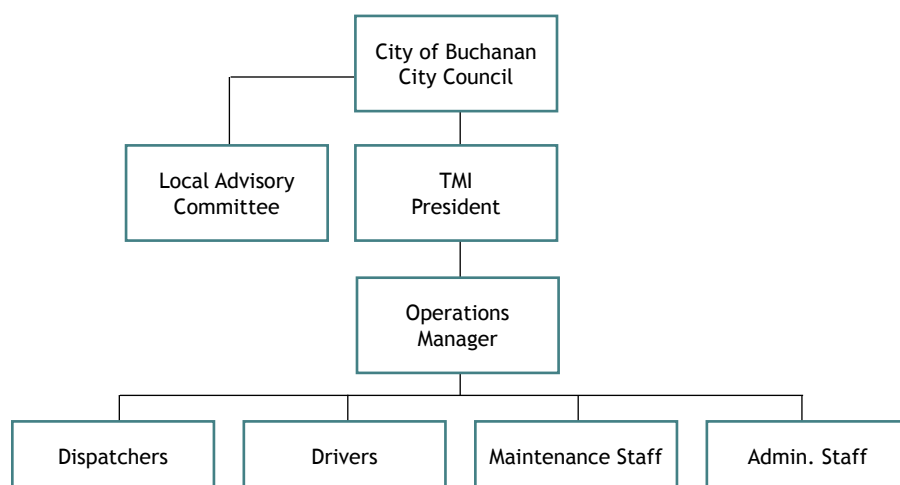
Figure 2-2: Berrien Bus Organizational Chart



Buchanan Dial-a-Ride

Buchanan Dial-a-Ride is organized under the State of Michigan Home Rule Act which authorizes cities to form transit systems. The Buchanan Dial-A-Ride organizational structure (Figure 2-3) begins with the Buchanan City Council that acts as the Buchanan Dial-a-Ride Board of Directors. A LAC (separate from the LACs for the other transit systems) supports the City Council and meets on a quarterly basis to provide feedback and recommendations about the Buchanan Dial-a-Ride services. A City Coordinator serves as oversight director of TMI in the Buchanan service area. TMI has a management staff that oversees dispatch, drivers, maintenance, and administrative personnel. As noted in the organizational chart, TMI provides a greater administrative role for Buchanan Dial-a-Ride as compared to Berrien Bus.

Figure 2-3: Buchanan Dial-A-Ride Organizational Chart



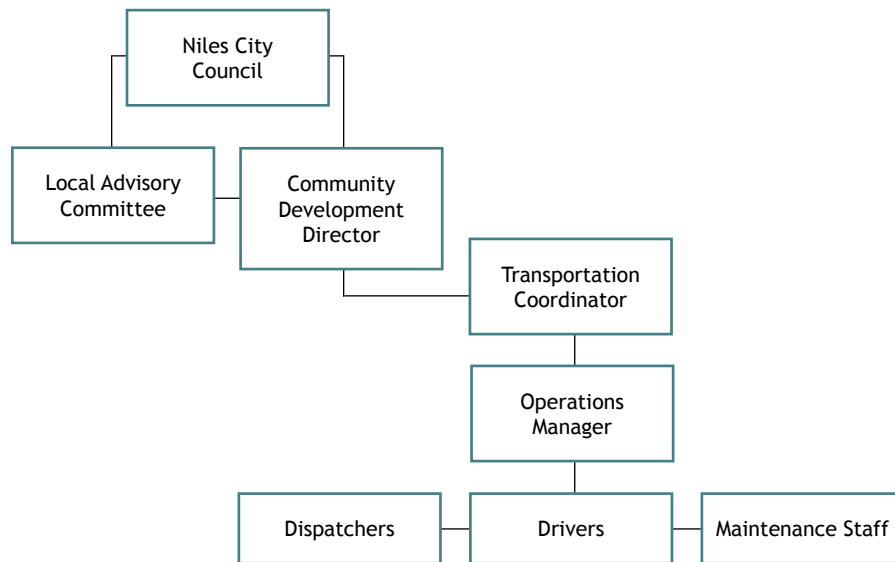
Niles Dial-a-Ride

Niles Dial-a-Ride is organized under the State of Michigan Home Rule Act which authorizes cities to form transit systems. The City Council of Niles serves as the Niles Dial-a-Ride Board. The Board is supported by a LAC that meets on a quarterly basis to provide feedback and recommendations about the services. A

Community Development Director oversees the entire management staff and reports to the City Council. The Transportation Coordinator acts as the Executive Director of the transit system and reports directly to the Community Development Director and is responsible for all administrative duties performed by the system.

In 2011 Niles Dial-a-Ride allowed the operational contract for transit services to expire with an independent private contractor, and brought the operation of services back in house at the City of Niles. The Operations Manager reports to the Transportation Coordinator and oversees drivers as well as maintenance and dispatch staff. The overall organizational chart for Niles Dial-a Ride is located in Figure 2-4.

Figure 2-4: Niles Dial-A-Ride Organizational Chart



OVERALL GOVERNANCE OPTIONS AND ALTERNATIVES

There are various organizational structures that can be considered for operating transit services in Berrien County outside the current arrangement. These involve the following that presented in no particular order of priority or recommendation:

- Option #1: Formation of a new countywide public transit authority that would operate all services.
- Option #2: Establishment of a new authority that would serve as umbrella organization with specific responsibilities to coordinate public transit services between the County's transit providers and to plan and develop new services. A similar authority was recently established in Southeast Michigan.
- Option #3: Expansion of the current TCATA authority to include other jurisdictions.
- Option #4: Establishment of a new transit authority in the areas outside of TCATA.
- Option #5: Formation of a new countywide public transit authority that would assume Berrien Bus services and provide a foundation for future consolidation efforts.

The following section reviews these options.

Option #1: New Countywide Public Authority to Operate All Services

A new countywide authority could be organized under the State of Michigan Public Transportation Act (Act 196 of 1986) which authorizes the formation of public transportation authorities with certain general

powers and duties. Under this alternative the organization would operate all public transit services in Berrien County (either directly or through contracts). The new authority would be an independent governmental unit and would have a governing body appointed by the member jurisdictions. This authority would also have the ability to levy a countywide millage with the approval of a majority of the registered electors residing in the County through a general or special election. More information on Act 196 of 1986 is included in Appendix A.

The countywide authority would have a Board of Directors whose primary purpose would be to assure that the authority fulfills its mission and meets its goals. More specifically, the Board would:

- Develop goals and objectives for the authority and ensure that these are met.
- Provide fiduciary oversight.
- Set service policies, standards, and organizational priorities.
- Provide vision for strategic planning efforts.
- Hire the Transit Director and oversee his or her performance.
- Serve as a liaison between the authority and elected officials.
- Beyond the Board, local stakeholders could participate on a Transportation Advisory Committee (similar to the current LAC).

Advantages

- Establishes a governance structure to lead countywide transit services.
- Eliminates the need for four separate governance structures and LACs.
- Provides an organizational structure to implement a countywide millage to support transit services.

Disadvantages

- Requires local jurisdictions to give up local control and instead participate in a countywide organizational structure.
- Requires each contributing jurisdiction to be represented on a countywide Board as opposed to a local one.

Cost Benefit and Impact Considerations

- There would be administrative costs related to the process in arranging for a countywide millage vote, advocating for support for the millage, and if successful, transitioning from the local millage system to the countywide one. In the long run, administrative expenses could be reduced since multiple jurisdictions would not need to go through this process.
- The creation of a new public transit authority would eliminate the need for oversight by an individual system as now provided by the TCATA Board of Trustees, the Berrien County Commissioners, the City of Buchanan Commission, and the Niles City Council. The new authority would instead be overseen by a Board that includes representatives from all participating communities.

Option #2: Establish New Authority to Serve as Umbrella Organization

Another option is to form a new authority as discussed in the previous alternative, but one that looks at transit services from a countywide perspective and serves an “umbrella” entity that performs transit management, service planning, transit oversight, customer service, and training functions for the transit systems it oversees—but it does not actually run any buses. In this arrangement, actual operation of services would be provided through agreements or contracts with public or private transit operators (such as those already operating in Berrien County).

This approach is typically used in regions with multiple providers where there is consensus that services should be planned and viewed as one, but there is no agreement on a single operator system. For instance, in the Detroit area the Regional Transit Authority (RTA) of Southeast Michigan was established to coordinate public transit services between various providers. The specific powers of the RTA include planning for and developing new services and guiding and coordinating the use of federal and state funds

that come to the region. Under the RTA local funds, including millage proceeds, remain under the sole jurisdiction of each individual transit provider. A copy of the RTA master agreement between the RTA and public transportation providers in the region that details powers and obligations can be found in Appendix B.

The umbrella entity model does not require an authority, though since typically a public or non-profit agency serves in this capacity the use of an authority would be logical. However, during discussions with the project advisory members there was little interest in this governance alternative.

Advantages

- Provides structure for viewing services from a countywide perspective, including implementation of new services.
- Provides structure to coordinate areas outside of direct operations (marketing, planning, customer service, procurement) into one entity.
- Allows for use of current arrangements to provide transit in the County since some services could be operated by public providers and some contracted out to private providers.

Disadvantages

- Depending on arrangements, it may create another layer of administration and increase costs for providing countywide services.
- An umbrella entity, i.e. a new authority, would need to be established and staffed appropriately.

Cost Benefit and Impact Considerations

- May increase costs for providing countywide services depending on administrative arrangements.
- Similar to the previous alternative, there would be administrative costs in establishing this arrangement.
- The use of an umbrella organization would eliminate the need for individual oversight now provided by the Berrien County Commissioners, the City of Buchanan Commission, and the Niles City Council.

Option #3: Expand Current Transit Authority

The same Michigan Act that allows for the creation of a public transportation authority also includes a provision that allows membership after the formation of an authority. Specifically, it notes that political subdivisions or portions of a city, village, or township may become a member of a public authority after the public authority's formation upon:

- Resolution adopted by a majority vote of the members elected to and serving on the legislative body of the political subdivision requesting membership for all or a portion of the political subdivision, and
- Upon resolution adopted by a 2/3 vote of the members serving on the Board of the public authority, approving an amendment to the Articles of Incorporation of the public authority adding all or a portion of the political subdivision.

Currently, TCATA is the only system of the four in the County that is organized as an authority. Based on a provision in the Act, other jurisdictions could join to form a countywide authority with a similar structure as outlined in the previous alternative and with similar taxing capabilities.

Advantages

- Makes use of an existing organization structure.
- Possibly a faster process to implement than setting up a new authority.
- Provides an organizational structure to implement countywide millage to support transit services.
- Would allow communities to join a consolidated system incrementally.

Disadvantages

- Would require agreement from Berrien County and from communities outside the Benton Harbor/St. Joseph area to join the existing authority established strictly for the urbanized area.
- Would require current TCATA Board of Directors to consider the expansion of authority to include areas outside Benton Harbor/St. Joseph.
- Would necessitate a name change of the authority to reflect the expansion.
- Services and funding would still be disconnected if all jurisdictions do not join at the same time.

Cost Benefit and Impact Considerations

- There would be administrative costs related to the process in arranging for a countywide millage vote, advocating for support for the millage, and if successful transitioning from the local millage system to the countywide one. In the long run, administrative expenses could be reduced since multiple jurisdictions would not need to go through this process.
- The expansion of the current authority would eliminate the need for the individual oversight now provided by the Berrien County Commissioners, the City of Buchanan Commission, and the Niles City Council.

Option #4: Implement Authority for Area Outside of TCATA

In lieu of one countywide structure there can be consideration of the creation of an authority for the areas of the County outside the Twin Cities area. In this option, the TCATA organizational structure would not change, but the remainder of the County would be organized under an authority using Act 196 of the 1986 legislation. Similar to the other organizational options, it would require a resolution adopted by a majority vote of the members elected to and serving on the legislative body of the political subdivision in the County. This authority would have a similar Board and advisory structure and similar taxing capabilities.

Advantages

- Provides a structure for providing services outside Benton Harbor/St. Joseph area in a more efficient and effective manner.
- Provides a structure for the implementation of new countywide services and for bringing various townships into transit planning and funding.
- Doesn't require melding together as many systems with different pay scales, driver benefits, etc.
- Takes advantage that two systems are already basically consolidated since their services are contracted through same provider.
- May be more appealing than creating one countywide authority or expanding a current one.
- Would provide structure to allow communities and townships to join incrementally.

Disadvantages

- Does not fully address disconnect in countywide services and duplication of functions.
- Would not respond to legislation under consideration at the state level that would reduce public transit funding for counties with multiple providers.

Cost Benefit and Impact Considerations

- Similar to the previous alternative, there would be administrative costs in establishing the authority, making arrangements for a millage vote, and advocating for support for the millage. In the long run, administrative expenses could be reduced since multiple jurisdictions would not need to go through this process.
- The creation of a new authority that operates service in the County outside the Twin Cities area would eliminate the need for individual oversight now provided by the Berrien County Commissioners, the City of Buchanan Commission, and the Niles City Council for their respective systems.

Option #5: Implement Countywide Authority for Current Berrien Bus Services

After discussion, the project advisory committee supported a different alternative involving the formation of a new authority that would assume current Berrien Bus services and would provide the foundation for countywide transit services. This authority would have a similar Board and advisory structure as outlined in the previous alternatives and similar taxing capabilities.

Advantages

- Establishes a structure that provides opportunity for countywide transit services, but doesn't require immediate melding of multiple transit systems with different pay scales, driver benefits, etc.
- Provides a structure that allows for countywide involvement and oversight from the outset.
- Provides a structure to allow TCATA, Buchanan Dial-A-Ride, and Niles Dial-A-Ride to join incrementally and at a pace comfortable for all jurisdictions and community stakeholders.

Disadvantages

- Does not address disconnect in countywide services and duplication of functions.
- Would not respond to legislation under consideration at the state level that would reduce public transit funding for counties with multiple providers.

Cost Benefit and Impact Considerations

- Similar to the previous alternative, there would be administrative costs in establishing the authority, making arrangements for a millage vote, and advocating for support for the millage. In the long run, administrative expenses could be reduced since multiple jurisdictions would not need to go through this process.
- The creation of a new authority that operates current Berrien Bus services would eliminate the need for individual oversight now provided by the Berrien County Commissioners.

PROCESS FOR IMPLEMENTING AN AUTHORITY FOR CURRENT BERRIEN BUS SERVICES

Through numerous discussions with the advisory committee throughout the planning process, there was consensus that at this point in time the last alternative was the preferred option. Therefore, the remainder of this chapter is directed to this approach. However, much of this process is applicable to the other alternatives presented and would be useful if a different option is chosen in the future.

A new transit authority for the area of the County currently served by Berrien Bus would be organized under the State of Michigan Public Transportation Act (Act 196 of 1986) which authorizes the formation of public transportation authorities with certain general powers and duties. Formation of a public authority may be accomplished by adoption of Articles of Incorporation by resolution adopted by a majority of the members serving on the governing body of the authority incorporated under Act No. 55 of the Public Acts of 1963 or Act No. 204 of the Public Acts of 1967. This new Berrien County Transit Authority (BCTA) would be an independent governmental unit, and would have the ability to levy a millage. More information on a potential millage is included in a later chapter that discusses funding.

The public transportation authority act provides a variety of guidance that would need to be considered in establishing the BCTA. An example of Articles of Incorporation, from the creation of the Bay Metropolitan Transit Authority that serves Bay County, is included in Appendix C. The development of bylaws would also be a component of the formation of an authority. The bylaws would confirm composition and

responsibilities of the Board of Directors and document other procedures for the authority. Appropriate examples of bylaws from other transit authorities in Michigan can be used to develop the BCTA bylaws.

GOVERNANCE

Board of Directors - Roles and Responsibilities

The BCTA would have a Board of Directors whose primary purpose would be to assure that the authority fulfills its mission and meets its goals. More specifically, the Board's purpose would be to:

- Develop goals and objectives for the authority and ensure that these are met,
- Provide fiduciary oversight,
- Set service policies, standards, and organizational priorities,
- Provide vision for strategic planning efforts,
- Hire the Transit Director and oversee his or her performance, and
- Serve as a liaison between the authority and elected officials.

A critical function of the Board of Directors would be setting the course for the future of the organization by developing vision and mission statements and establishing values and beliefs to guide the authority. While these important governing guidelines will need to be developed as part of the initial responsibilities of a BCTA Board, the following are proposed for consideration:

Mission: To provide safe, efficient, affordable, and customer friendly transportation services for the residents and visitors of Berrien County.

Vision: We envision a future for our community in which:

- Public transportation supports individual independence by offering citizens an economical and efficient way to access jobs, medical facilities, education institutions, shopping centers, and other critical community destinations;
- Public transportation supports economic development by providing access to employment, retail, and other locations in the community;
- Public transportation offers local businesses additional solutions for recruiting and retaining employees;
- BCTA works to improve coordination of current transportation services in Berrien County and for an improved network of regional public transportation options and mobility solutions;
- BCTA serves as the foundation for a possible unified countywide system that meets the mobility needs of all County citizens.

Beliefs: BCTA will carry out our mission based on the following beliefs:

- Responsibility to our customers. We believe that our transportation system should be a customer-oriented enterprise.
- Responsibility to Berrien County citizens. We believe that communities have a moral and economic obligation to provide transportation alternatives to all citizens. We also have an obligation to ensure that each taxpayer dollar used to provide mobility is done so efficiently and effectively.
- Role in regional development. We believe that the public transportation system plays an important role in shaping regional development patterns and improving the quality of life in our community. A well-designed public transportation system can support an environmentally sustainable future, control urban sprawl by promoting responsible development, increase energy conservation, and reduce traffic congestion.
- Collaboration. We believe that no single organization can provide all the transportation solutions needed by our citizens. We must build broad-based collaborations to blend a wide variety of

transportation options into a flexible and responsive network focused on the needs of every citizen.

Values: As an organization we are committed to embodying the following values in how we carry out our mission:

- Customer service orientation. We will provide service that is convenient, affordable, accessible, timely, and responsive to customer needs.
- Customer loyalty. We will earn our customers' trust by providing service that is friendly, respectful, safe, and dependable.
- Employees. We see our employees as the first line of contact with our customers and, therefore, we value our employees as integral to the success of our organization.

Board of Directors Composition

The membership of the BCTA Board of Directors would include appropriate representation from the community. One of the challenges in setting up the Board is that the area currently served by Berrien Bus includes three cities, seven villages, ten townships, and ten unincorporated areas. Board membership would need to take this into account to ensure all communities served by the new authority felt they were being appropriately represented. Ideally, this would be accomplished by appropriate representation from the Board of County Commissioners and through appropriate term limits that ensure rotation of Board members.

The following are some examples of the Board of Directors' compositions for transit authorities in other areas of Michigan:

- The Rapid (Interurban Transit Partnership), the authority that provides public transportation services for the Grand Rapids metro area, is overseen by a 15-member board of directors that represent the six municipalities in The Rapid service area. The current Board make-up includes the following number of representatives from each jurisdiction:
 - East Grand Rapids (2)
 - Grand Rapids (5)
 - Grandville (2)
 - Kentwood (2)
 - Walker (2)
 - Wyoming (2)
- The Greater Lapeer Transit Authority (GLTA) is overseen by a Board of Directors representing the various communities served by the systems. The current make-up contains the following representatives:
 - Elba Township
 - City of Lapeer (3)
 - Oregon Township
 - Mayfield Township
 - Lapeer Township
 - Deerfield Township
- Bay Area Transportation Authority (BATA) that serves Grand Traverse and Leelanau Counties is governed by a seven-person Board of Directors composed of appointees from both counties.

Beyond Michigan there are a variety of transit authorities that could be used as possible examples when determining the BCTA governance structure. One example that is applicable to the possible Berrien County arrangement is Pioneer Valley Transit Authority (PCTA), based in Springfield, Massachusetts. Although the PCTA is a regional transit system, the governance structure is similar to a possible BCTA since it provides service in multiple communities. The cities and towns that are served by the PCTA pay an assessed amount, depending on the number of fixed route miles and paratransit passengers served in that

city or town. The PCTA Advisory Board consists of 24 members representing the various cities and towns. These representatives are the Mayor, City or Town Manager or Administrator, or the Chair of the Board of the local community. Advisory Board members may appoint designees to act on their behalf.

A variety of other representatives can be considered for the Board, often representing populations groups most likely to need transit services, key community locations, and public and private organizations. For instance, in Cass County the Board consists of the Chair of the Southwestern Michigan College Board, the Chair of the Mental Health Board, the Chair of the Council on Aging Board, and the Chair of the Department of Human Services/Medical Care Facility Board. Some considerations for the BCTA Board would include the human service agencies that currently contract for transportation services with Berrien Bus since this revenue is then used to support the local match requirement for federal and state funding programs. Others would include Lake Michigan College and Lakeland HealthCare. Another option to help ensure representation and involvement from a variety of community stakeholders is the use of the LAC already in place for Berrien Bus or the formation of a technical committee.

Proposed Board Composition

After review of the various governance options and discussions with the advisory committee and community stakeholders, it appears that a nine to eleven member Board that considers Berrien County Board of County Commissioner districts (a map of the twelve districts is included in Appendix D), geographical distribution, urban boundaries, and existing transit systems would be the most conducive. While the Board composition would be finalized after discussions between the Berrien County Board of County Commissioner and Berrien County staff on the implementation of the BCTA, it is anticipated it would include:

- Three members comprised of one member from each of the other current transit systems operating in Berrien County. These three members would cover approximately six commissioner districts.
- Five members from the county at large. These 5 members would cover areas generally represented by five commissioner districts.
- One member from the County Board of Commissioners.
- If desired an additional two members could be added for a maximum size Board of eleven.

The advantages of this Board structure include:

- All areas of Berrien County would be represented,
- The Berrien County District is already understood by the Commissioners and the general public,
- While initially transit services would still be operated by different systems, the oversight by this structure would help to ensure that services are viewed on a countywide basis from the outset, and
- Arrangements would be in place for appropriate discussions of a potential countywide millage to support transit services.

A drawback to this arrangement is that some areas of that County would be represented on the Board even though the BCTA would not be serving their portion of the County. However, based on the assessment of the various options discussed throughout the project it appears the only way that countywide services will be implemented in Berrien County is a collective effort led by decision makers at the County level.

Beyond the Board structure it will be important to gain input from a wide range of local stakeholders. An advisory committee that incorporates the LAC role and includes additional representatives could be formed. Potential members include:

- Area Agency on Aging
- Benton Harbor Housing Commission
- Berrien County Health Department
- Berrien County Veteran Services
- Chamber of Commerce
- Citizens – General Public

- Citizens – Users of Public Transit Services
- Department of Corrections (County or State)
- Disability Network of Southwest Michigan
- Lakeland Hospital
- Lake Michigan College
- Major Employers
- Michigan Works! Association
- Michigan Department of Human Services
- Riverwood Mental Health

Board Nominating Process

After agreement on a structure, a process would need to be established for staffing the initial Board of Directors, for community stakeholders to express interest in serving on the Board, and for new members to be appointed at appropriate time intervals. After establishment of the Board one of the Governing Subcommittees (discussed later in this chapter) would handle this process.

Appendix E includes the nominating process for Jackson Area Transit Authority that can serve as a template for the BCTA.

Governing Principals

The new BCTA Board should establish a set of governing principals, especially critical with the establishment of a new authority. The following governing principals are proposed:

The Board of Directors, as BCTA's governing body:

- Serves as the steward and guardian of BCTA's values, vision, mission, and resources,
- Plays a leading, proactive role in BCTA's strategic decision making, and in setting strong, clear strategic directions and priorities,
- Monitors BCTA performance (both operational and financial) against clearly defined performance targets,
- Ensures that the BCTA image and relationships with the wider community and key stakeholders are positive, and that they contribute to BCTA's success in carrying out its mission,
- Ensures that BCTA possesses the financial and other resources necessary to realize its vision and carry out its mission fully,
- Strives to ensure that the Board possesses the attributes and qualifications required for strong governance, and that the governing knowledge and skills of Board members are systematically developed,
- Ensures that Board members are fully engaged in the governing process and that the resources they bring to the Board are fully utilized in governing,
- Takes accountability for its own performance as a governing body by setting clear, detailed Board governing performance targets, and by regularly monitoring and assessing Board performance,
- Appoints a Transit Director who is responsible for providing executive direction to all BCTA operations, and
- Works in close partnership with the Transit Director to ensure that clear, detailed performance targets are set, and periodically evaluates the Transit Director's performance against these targets.

Governing Subcommittees

The new BCTA would need to consider possible subcommittees to help carry out Board functions and to help support the Board governance responsibilities. The following subcommittees can be initially considered, and others added as needed in the future:

- Governance: Typically headed by the Board Chair and consisting of the chairs of the other committees

and the Transit Director, the Governance Subcommittee manages and coordinates Board operations, including setting the agenda for each Board meeting based on the work of other subcommittees.

- **Planning and Development:** Working closely with the Transit Director, this subcommittee would coordinate Board member involvement in BCTA strategic and operational planning and budget preparation.
- **Performance Monitoring/External Relations:** This subcommittee would be responsible for designing financial and operational performance reports in close collaboration with the Transit Director and other senior managers for monitoring BCTA financial and operational performance, and for maintaining a positive public image and productive working relationships with key stakeholders.

Proposed roles and responsibilities for these possible subcommittees are included in Appendix F.

Board Meetings

While the Public Transportation Act does not specifically address Board meetings in the legislation, regular Board meetings should be scheduled and well publicized. All meetings should be publicly noticed in accordance with the Michigan Open Meetings Act, and agendas and minutes should be posted and available in a variety of formats.

Ongoing Board Support and Assistance

After establishment of the initial Board of Directors, ongoing support and assistance will be critical to ensure the success of the Board. As noted in Appendix F, one of the responsibilities of the Governance Subcommittee is developing and overseeing execution of a formal Board member capacity building program. This program would include orientation of new members, continuing education and training, and a possible mentoring program pairing new Board members with senior Board members. Other considerations include an annual Board retreat that allows members to review accomplishments from the previous year and to strategize for the coming one.

Future Opportunities

This same Michigan Act that allows for the creation of a public transportation authority also includes a provision that allows new membership after the formation of an authority. Specifically, it notes that political subdivisions or portions of a city, village, or township may become a member of a public authority after the public authority's formation upon:

- Resolution adopted by a majority vote of the members elected to and serving on the legislative body of the political subdivision requesting membership for all or a portion of the political subdivision, and
- Upon resolution adopted by a 2/3 vote of the members serving on the Board of the public authority, approving an amendment to the Articles of Incorporation of the public authority adding all or a portion of the political subdivision.

As stated by the advisory committee, the establishment of an authority for the area currently served by Berrien Bus would provide the governance structure that could serve as the foundation for the possible provision of countywide services in the future. The proposed BCTA would also provide the organizational structure to implement a countywide millage to support transit services.

Regulatory Issues

No matter the organizational structure that is eventually chosen by local stakeholders, compliance to drug and alcohol testing, CDL requirements, ADA regulations, Title VI requirements, and other regulatory

issues will still be required.

Countywide services through one entity should have no significant negative impact in a fully consolidated system. The regulatory issues must be complied with under any circumstance. However, by consolidating the four services the regulatory burden will be minimized as one entity will take the place of four. This means one drug and alcohol testing system and consistent driver training to ensure compliance with the ADA and other regulations.

If services are provided through the two entity model, some reduction of the regulatory requirements would occur as the four systems would become two. This would also eliminate duplicative management and administration required to manage the regulatory issues.

Under the umbrella organization arrangement, handing overall regulatory issues would be the responsibility of this entity—but still carried out by the 3 to 4 individual providers. Rather than reducing regulatory burdens, this will simply add to the burden and the responsible party will not have the authority to carry out the requirements.

Chapter 3

STAFFING CONSIDERATIONS/ CONCEPTUAL STAFFING PLANS

This chapter reviews the current staffing levels at the four transit systems operating in Berrien County. It then discusses overall staffing considerations related to the BCTA discussed in the previous chapter, and offers a conceptual staffing plan for this new entity as well as one for a broader countywide transit system.

CURRENT STAFFING STRUCTURES AND LEVELS

As noted in Chapter 2, for the most part the four transit systems operating in Berrien County operate independently from an organizational standpoint. The only exception is that both Berrien Bus and Buchanan Dial-a-Ride services are contracted through TMI. As indicated in the organizational charts provided in Chapter 2, each system has its own structure and administrative staff. As a result there is staffing duplication in terms of both the administration and operation of transit services in the County.

Table 3-1 provides an overview of staffing for the four transit systems as of December 2013. Each system has staff involved in management and operations. As a result, countywide there are thirteen positions involved in management or administrative functions and seventeen involved in operations and dispatching. Since the same contractor operates both the Berrien Bus and Buchanan Dial-A-Ride systems, there are some positions involved in both programs. However, the number of current positions needed to provide services in the County is much greater than would typically be needed for the number of vehicles being operated. The savings through a more coordinated or consolidated system by reducing management and administrative functions could then be redirected to expansion of services to help meet gaps in public transportation in the County.

Table 3-1: Current Staffing Levels

Transit System	Management Staff	Administrative Staff	Maintenance Staff	Operations Staff	Vehicle Operators
TCATA	- Director - Assistant Director	- Office Manager - Procurement Officer - Accounting Manager	- Head Maintenance - Maintenance Helpers (3)	- Head Dispatcher - Dispatcher (2) - Dispatch Trainee - Phone Answerer (2)	- Full-time (10) - Part-time (15)

Transit System	Management Staff	Administrative Staff	Maintenance Staff	Operations Staff	Vehicle Operators
Berrien Bus	Contract with TMI managed by County Transit Coordinator.	Clerical (2 part-time)	- Mechanics (1 full time, 1 part-time) - Maintenance (1 part-time)	- Operations Manager/ Assistant Manager/ Contractor Administration - Dispatchers (2 full-time, 1 part-time)	- Full-time (12) - Part-time (3)
Buchanan Dial-A-Ride	Contract with TMI managed by City of Buchanan and Berrien County. Both charge an administration fee.	Clerical (2 part-time)	Mechanics (2 part-time)	- Operations Manager/ Contractor Administration - Dispatchers (2 part-time)	- Full-time (1) - Part-time (1)
Niles Dial-A-Ride	Transportation Coordinator (part-time)		Mechanic	- Operations Manager - Dispatchers (1 full-time, 2 part-time)	- 13 (all part-time) - One driver also serves currently as custodian
Total Positions Involved	6	7 (3 full-time/ 4 part-time)	10 (6 full-time/ 4 part-time)	17 (11 full-time/ 6 part-time)	55 (23 full-time/ 32 part-time)
Source: Staffing information and data provided by each transit system individually in December 2013.					

Management and Contract Administration Costs

As indicated in Table 3-1, six positions are directly involved in the management of transit services in Berrien County. In addition, there are management and administrative costs related to the contractual arrangements between the City of Buchanan and Berrien County with TMI. Table 3-2 provides a summary of these costs, showing that in FY2013 approximately \$305,000 was spent on management and contract administration between the four transit systems.

Direct Administrative Costs

As four distinct organizations operating transit services in Berrien County, administrative functions and responsibilities are performed separately. As a result, a variety of positions at each system are involved in administrative responsibilities. Table 3-3 provides the approximate costs for administrative positions that are directly involved with the operation of the four systems, an additional \$121,680 beyond the management and contract administration expenses.

Additional Administrative Functions and Responsibilities

The administrative functions of the four public transit systems are staffed in a variety of ways beyond these direct positions, as various departments of local government and the contractor that operates Berrien Bus and Buchanan Dial-A-Ride also serve in administrative roles. Table 3-4 provides a more detailed review of the numerous positions and departments that are involved in these administrative functions and responsibilities. As indicated in this table, numerous employees and local governments are involved in financial, procurement, clerical, and office management functions. However, despite the involvement of a variety of administrative positions across the four transit systems, there are no positions dedicated to marketing, service planning, and safety/training.

There are also a variety of departments across Berrien County that provide additional administrative functions to support transit services, including risk management, human resources, legal guidance, and grant administration. Table 3-5 provides an overview of these additional responsibilities, the various departments involved in these functions, and overall duplication in these functions.

Table 3-2: Approximate Management Costs - FY2013

		Salary/Contract Administration
TCATA	Director	\$58,359
	Assistant Director	\$48,204
Berrien Bus	Transit Coordinator	\$24,897
	TMI (1)	\$100,000
Buchanan Dial-A-Ride	TMI (2)	\$25,000
	City of Buchanan (3)	\$15,136
	Berrien County (3)	\$3,600
Niles Dial-A-Ride	Transportation Coordinator	\$30,000
Total		\$305,196
(1) Includes approximate costs for Operations Manager, Assistant Manager, and Contract Administration as reported by TMI.		
(2) Includes approximate costs for Operations Manager and Contract Administration as reported by TMI.		
(3) Administration costs for these jurisdictions as reported by TMI.		
Sources: Information from individual transit systems/reports to MDOT.		

Table 3-3: Approximate Administrative Costs - FY2013

		Approximate Salaries
TCATA	Office Manager	\$21,424
	Procurement Officer	\$21,424
	Accounting Manager	\$21,424
Berrien Bus	Clerical (1)	\$28,704
Buchanan Dial-A-Ride	Clerical (1)	\$28,704
Total		\$121,680
(1) Based on average salary of clerical staff as reported by TMI.		
Sources: Information from individual transit systems.		

Table 3-4: Current Administrative Levels

Transit System	Finance/ Accounting	Procurement	Office Management/ Clerical	Marketing/ Outreach	Service Planning	Safety and Training
TCATA	1 Full-time Position	1 Full-time Position	1 Full-time Position	No dedicated positions.	No dedicated positions.	No dedicated positions.

Transit System	Finance/ Accounting	Procurement	Office Management/ Clerical	Marketing/ Outreach	Service Planning	Safety and Training
Berrien Bus	Transportation Coordinator position works with Berrien County Financial Services Department and with TMI.	Transportation Coordinator position works with appropriate County departments and with TMI.	2 Part-time Positions (at TMI)	No dedicated positions. TMI responsible for marketing.	No dedicated positions. Transportation Coordinator works with TMI.	No dedicated positions. Transportation Coordinator works with TMI.
Buchanan Dial-A-Ride	Transportation Coordinator position works with Buchanan City Manager and with TMI.	Transportation Coordinator position works with Buchanan City Manager and with TMI.	2 Part-time Positions (at TMI)	No dedicated positions. TMI responsible for marketing.	No dedicated positions. Transportation Coordinator works with TMI.	No dedicated positions. Transportation Coordinator works with TMI.
Niles Dial-A-Ride	Transportation Coordinator position works with City of Niles Finance Department.	Transportation Coordinator position works with appropriate City of Niles departments.	Handled by Operations staff.	No dedicated position.	No dedicated positions. Part-time Transportation Coordinator position includes planning role.	No dedicated positions. Part-time Transportation Coordinator and Operations Manager involved in safety/training.
Total Positions Involved	-One full-time position -Two management positions -Berrien County staff -City of Buchanan staff -City of Niles staff -Private transportation contractor (TMI)	-One full-time position -Two management positions -Berrien County staff -City of Buchanan staff -City of Niles staff -Private transportation contractor (TMI)	-One full-time position -Four part-time positions -Appropriate operations staff	No dedicated positions.	No dedicated positions.	No dedicated positions.

Table 3-5: Current Administrative Responsibilities

	TCATA	Berrien Bus	Buchanan Dial-A-Ride	Niles Dial-A-Ride
Risk Management	TCATA Michigan Transit Pool	Berrien County Michigan Transit Pool	Berrien County Michigan Transit Pool	City of Niles Independent Insurance
Insurance	TCATA	TMI	TMI	City of Niles
Grants Administration	TCATA	Berrien County	TMI	City of Niles
Legal	None	Berrien County	City of Buchanan	City of Niles
Human Resources	TCATA	TMI	TMI	City of Niles
On-line Resources (mywaythere.org)	SWMPC	SWMPC	SWMPC	City of Niles/SWMPC
Professional Service Contracts	TCATA	TMI	TMI	City of Niles
Marketing Brochures/ Outreach Materials	TCATA/SWMPC	TMI	TMI	City of Niles

Clearly administrative costs are an area where significant savings can be realized through a consolidated or better coordinated arrangement. The number of management and contract administrative positions currently needed to provide services in Berrien County is much greater than would typically be needed for the number of vehicles being operated. Transit programs of about 60 vehicles would typically require 5-6 total management and administrative personnel, as opposed to the 13 that are directly involved in the operation of transit services in Berrien County.

Additional savings can be obtained by eliminating multiple levels of oversight and redundant functions, i.e. where local governments and service providers are both incurring administrative costs for the operation of single transit system. For instance, instead of three different departments being involved in human resources, through a consolidated system these functions can be handled by one. The possible savings from reducing management and administrative expenses could then be redirected to greater supervision and safety and/or expansion of services to help meet gaps in public transportation in the County.

OPERATIONS/STAFFING CONSIDERATIONS

The Public Transportation Authority Act notes that an authority may operate services directly, may contract for services, or may employ a management firm to operate the public transportation system, under the supervision of the public authority. Therefore, the BCTA could choose to operate services directly or could contract for services similar to the current arrangement in place between Berrien County and TMI.

No matter the operating arrangement, the BCTA will require an administrative staff to serve as the liaison to the Board of Directors, oversee the operations, and manage the contract(s) if services are provided through a third party. In addition, as an independent entity the BCTA would have administrative responsibilities now handled by the County.

Overall, in regard to BCTA staffing and operations there are the following considerations. Each relates to short-term considerations to help ensure a smooth transition from a County department to an independent authority, while at the same time developing the foundation for future actions:

- To ensure consistency through the transition to a newly formed BCTA, transit services could continue to be contracted out in a similar manner to the current Berrien Bus agreement. This arrangement would provide the Board of Directors, working in consultation with the Transit Director, with the time to fully evaluate if providing services directly or continuing to contract for services is the most conducive option. The current contract between the County and TMI is through September 30, 2014, and can be extended through FY2015 before a new request for proposal needs to be issued.
- The BCTA Transit Director position would have the same initial responsibilities as the current Berrien Bus Transportation Coordinator position. The Board and the Transit Director would then assess the organizational needs going forward. This could include a marketing/planning position that would be involved in a millage campaign—and if successful—in the planning and implementation of potential new services that would result from the additional revenues.
- Through a Memorandum of Agreement (MOU) or similar agreement between BCTA and Berrien County, the Transit Director position could be initially housed at the same location as the current Transportation Coordinator. In addition through this MOU, the BCTA could confirm the services the County would provide in support of the authority (i.e. legal counsel) and the related costs. After further evaluation by the BCTA Board of Directors, and in conjunction with future staffing expansions, alternate office locations can be considered and a reduction in County support assessed.
- Overall, in effect the BCTA begins as a quasi-governmental entity and then transitions in the future

to a more independent one. This incremental process would provide the Board of Directors and the Transit Director with sufficient time to evaluate fully the staffing and operational considerations.

Looking further ahead to a countywide system, and closely tied with the various governance structures discussed in the preceding chapter, are potential staffing plans for the various options for operating transit services through one entity. In assessing the potential staffing options, it is useful to consider how transit services would typically be provided in a geographic area the size of Berrien County and with a fleet of approximately 56 vehicles. In this scenario, a typical transit system would have the following positions:

Administration:

- Transit Director
- Administrative Assistant
- Planning/Marketing Manager
- Finance Clerk/Bookkeeper
- Safety and Training Manager
- Mobility Manager

Operations:

- Operations Manager
- Administrative/Clerical Support
- Street Supervisor
- Dispatcher/Schedulers
- Fleet Maintenance Manager
- Maintenance Clerk
- Mechanic
- Mechanic Assistant
- Maintenance Utility Worker
- Drivers

Job descriptions, education requirements, common qualifications/skill requirements, and typical duties for these positions are included in Appendix G.

CONCEPTUAL STAFFING PLANS

Taking into account these considerations and the possible governance structures discussed in the preceding chapter, two possible organizational charts depicting staffing structure are provided in Figures 3-1 and 3-2. Figure 3-1 provides a conceptual organizational chart to support the initial formation of the BCTA. This conceptual staffing plan assumes that services would continue to be contracted out. Figure 3-2 then provides a conceptual staffing plan to support the broader vision of one countywide transit system through which services would be operated directly.

Figure 3-1: Berrien County Transit Authority Conceptual Organizational Chart

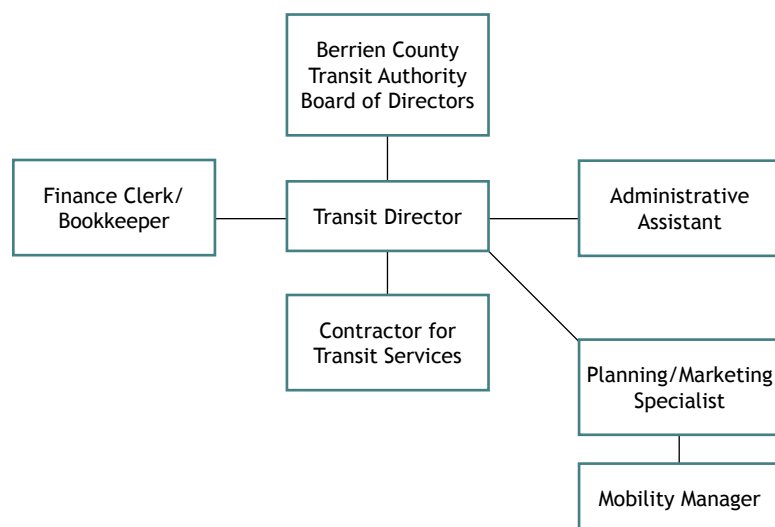
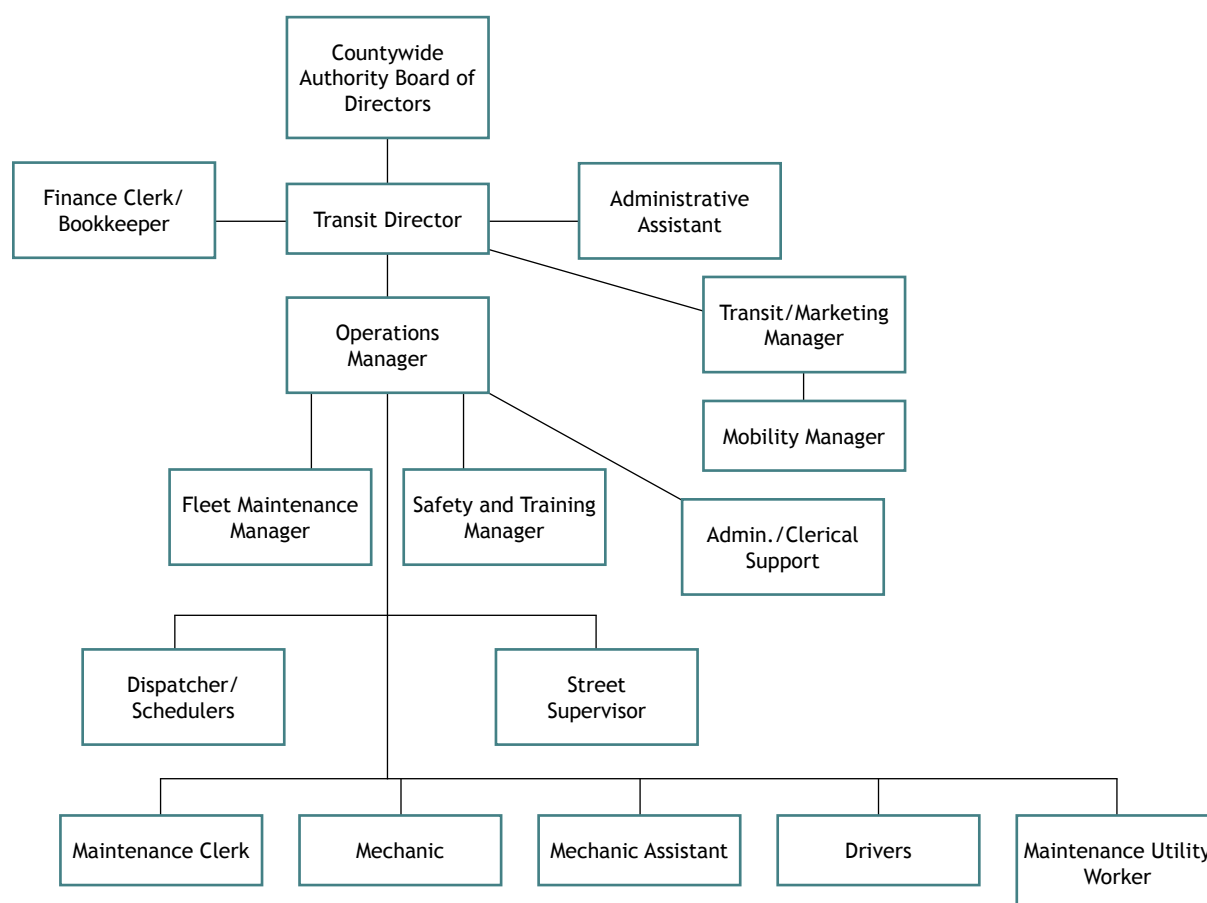


Figure 3-2: Countywide Services Conceptual Organizational Chart



COMPENSATION LEVELS

In line with staffing, another important area for consideration is that each system in Berrien County has its own wage scale. In addition, TCATA drivers and operations staff are represented by a union. Table 3-6 provides a review of salary ranges for operations staff at each of the four transit systems. Full-time employees for TCATA, TMI, and Niles Dial-A-Ride receive benefits as well as vacation and sick leave.

There are several methods that are typically used to establish wages and benefits for rural and small urban transit system employees. Most systems use a combination of these methods when developing their compensation packages, including:

- Internal equity, which ensures that jobs within an organization are comparably valued for the level of skill and responsibility,
- Market pricing, which ensures that compensation levels are competitive outside of the organization, but within the labor market, and
- Peer analysis, which reviews the compensation levels at an organization relative to other similar organizations within the region or nationally.

Once market conditions and market rates have been established, the following methods are typically used to set the exact salaries and benefits for transit system staff and can be considered for use by the BCTA:

- **Set by the Board of Directors** – Most governmental agencies and some multi-function non-profit agencies have established grade and/or step systems to benchmark comparable positions.

- **Set by Negotiation with the Union** – For small urban and rural transit systems that have employees represented by unions, wages and benefits are largely set through a negotiation process with union representatives and agency management.
- **Set by Contractor** – In situations where a private contractor provides service for a local system, the contractor typically sets the wages and benefits and may or may not share this information with the transit system, depending upon the contractual requirements.

Ultimately, implementation of a staffing plan in conjunction with a governance structure will need to consider a variety of factors in regard to setting wages and benefits. The Financial Plan included in Chapter 5 provides projected compensation levels using national research to develop conceptual operating budgets to support the proposed staffing plans.

Table 3-6: Current Wage Information

	Salary Range
TCATA	
Vehicle Operators (full-time)	\$12.25 per hour
Vehicle Operators (part-time)	\$10.57 per hour
Head Dispatcher	\$15.72 per hour
Dispatchers	\$12.91-\$13.22 per hour
Phone Answerers	\$9.23 per hour
Head Maintenance	\$16.12 per hour
Maintenance Helpers	\$7.62-\$12.25 per hour
Berrien Bus	
Vehicle Operators	\$9.50-\$15.00 per hour
Dispatchers	\$9.50-\$11.75 per hour
Mechanics	\$14.50-\$15.50 per hour
Maintenance	\$9.25-\$10.00 per hour
Buchanan Dial-A-Ride	
Vehicle Operators	\$9.75-\$12.00 per hour
Dispatchers	\$9.50-\$11.75 per hour
Mechanics	\$14.50-\$15.50 per hour
Niles Dial-A-Ride	
Operations Manager	\$40,000-\$46,000 per year
Vehicle Operators	\$9.75-\$12.34 per hour
Dispatcher (full-time)	\$13.20 per hour
Dispatcher (part-time)	\$9.75-\$12.34 per hour
Mechanics	\$22.00-\$25.00 per hour
Custodian	\$8.75 per hour
Sources: Information from individual transit systems, December 2013.	

Chapter 4

SERVICE AND OPERATIONAL CONSIDERATIONS/OPERATIONS PLAN

This chapter provides additional details on the current transit services operated in Berrien County that were introduced in Chapter 1. This information includes operating and performance data for the past three fiscal years, as well as operating expenses during that period. This chapter also reviews transit services in jurisdictions adjacent to Berrien County.

Despite the fact that there are four independently operating transit systems in Berrien County, there are still areas of the County that receive no public transit services. Approximately 47 percent of the St. Joseph/Benton Harbor urbanized area receives very limited or no service. Communities impacted are St. Joseph Township, Lincoln Township, Royalton Township, and the City of Bridgman.

In addition, there are instances where residents must transfer between multiple providers and endure a long travel time to make short trips. One example involves a customer who wants to travel from the City of Buchanan to South Bend so they can transfer to the TRANSPO system, about an eleven mile trip. This customer must call Buchanan Dial-A-Ride to schedule a ride to the Niles Dial-A-Ride headquarters where they then must wait for the Niles Dial-A-Ride Route 2 service to South Bend. This trip could take up to four hours to complete, and the customer must pay fares for both rides (\$4.00 for Buchanan Dial-A-Ride and \$2.00 for Niles Dial-A-Ride Route 2).

Therefore, this chapter concludes with a proposed Operations Plan, looking at transit services from a countywide perspective. While this is not a formal transit development plan, this Operations Plan includes proposed services to fill gaps and improve the ability to travel on public transit services throughout Berrien County.

CURRENT OPERATIONS

TCATA

Routes, Schedules, Fares, and Reservation Policies

TCATA operates a same day curb-to-curb (Dial-A-Ride) service open to the general public in Benton Harbor, Benton Township, and Royalton. The service runs from 6:00 a.m. to 6:00 p.m. Monday through Friday and 8:00 a.m. to 4:30 p.m. on Saturdays. Fares range from \$2.00 - \$6.00 for a one-way trip as detailed below:

- For Dial-A-Ride service within the City of Benton Harbor the fare is \$2 for the general public, \$1 for senior citizens and persons with disabilities, and \$1.25 for children six years of age or younger. Children ages one and younger are eligible to ride for free.

- For service between Benton Harbor and Benton Township the fare is \$3 for the general public, \$1.50 for senior citizens and persons with disabilities, and \$2 for children 6 years of age or younger.
- For service between Benton Harbor and Royalton the fare is \$4.50 for the general public, \$2.25 for senior citizens and persons with disabilities, and \$2 for children 6 years of age or younger.
- For service connecting locations outside of Benton Harbor the fare is \$6 for the general public, \$3 for senior citizens and persons with disabilities, and \$2.50 for children six years of age or younger.

TCATA also operates two fixed routes (Line Haul), shown in Figure 4-1 and Figure 4-2, in the Benton Harbor and St. Joseph areas that run from 6:00 a.m. to 10:00 p.m. Monday through Friday and 8:00 a.m. to 10:00 p.m. on Saturdays. The “Red” route is a one hour long loop connecting Benton Harbor, St. Joseph, St. Joseph Township, and Stevensville. The “Blue” route is a linear route with small loops on either end serving Benton Harbor and the Benton township retail area.

Through the Dial-A-Ride and fixed route services, some areas of Benton Harbor are served by both TCATA services—in effect TCATA competes against itself in these areas. As a result, customers often refer to the scheduled fixed route services as the “special” service and the demand-response Dial-A-Ride service as the “regular service.” This is counter to operations of most transit systems that typically encourage customers to ride fixed route services and only provide demand-response-type services for customers unable to access scheduled fixed route services. In addition, the focus on Dial-A-Ride services has resulted in strong demand for these services, and therefore customers and stakeholders have reported long wait times for pickup, and TCATA has reported an increased volume in no-shows since customers find other means of transportation after scheduling a ride.

Schedule and Dispatch Procedures

The TCATA scheduling for the Dial-A-Ride service occurs in real time. When a customer calls in a call taker writes the time of the call, the origin, and destination on the intake card. The card is then given to the dispatcher. The dispatcher has a large board with each bus number. They also have a screen showing the “Track It” Automatic Vehicle Locator (AVL) data. The dispatcher makes the determination of which bus will serve the trip, and radios the information to the driver who confirms the trip request on the driver log. The data from the intake cards and driver logs are entered into a spread sheet on a daily basis.

As part of a coordinated procurement effort organized by SWMPC, TCATA obtained Dial-A-Ride Online paratransit scheduling software. Due to the high volume of Dial-A-Ride services TCATA offers, which are all scheduled in real time, TCATA reports that the software is not advanced enough to accommodate their needs.

Origins, Destinations, and Trip Purposes

Because the overwhelming majority of trips provided by TCATA are demand-response, very detailed origin and destination data is available. The major origins consist of housing complexes and neighborhoods, in particular low income and subsidized housing developments in Benton Harbor.

Major trip destinations consist of Walmart, Meijer, and The Plaza shopping center. It should be noted that these locations are served by both the fixed route and Dial-A-Ride services. Many of the transit customers use the bus to get to and from their place of employment. Other major trip purposes include shopping and accessing the human service offices in the community.

Figure 4-1: TCATA Red Route

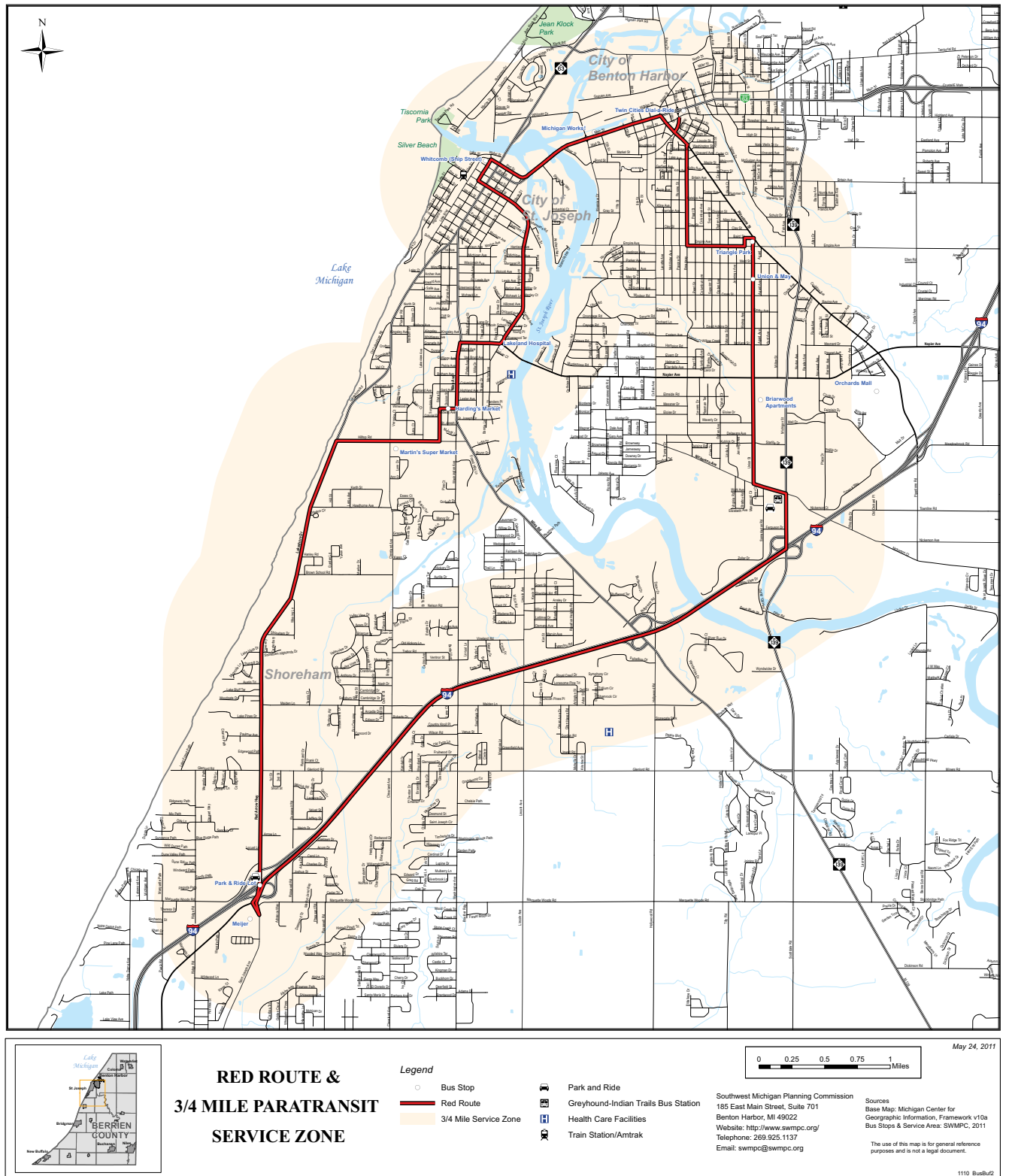


Figure 4-2: TCATA Blue Route



Berrien Bus

Routes, Schedules, Fares, and Reservation Policies

Berrien Bus is a curb-to-curb, advance reservation county-wide public transportation system serving the rural areas of Berrien County outside of the Niles and Buchanan service areas. Services are available to the general public. Rides are reserved on a first-called/first-served, space available basis. Hours of operation are Monday through Friday from 5:00 a.m. to 5:00 p.m. Fares range from \$2.50 to \$5, but seniors and persons with disabilities are charged 50 percent of the general fare. Berrien Bus also has fixed schedule service daily to Benton Harbor/St. Joseph that makes four runs every day, to Niles three times a day, and to Watervliet/Coloma twice a day.

Fares for Berrien Bus Dial-A-Ride services consist of a general public fare of \$2.50 for service within a five mile radius of Berrien Springs and \$5.00 for service beyond that radius. This fare is based on the current location of the Berrien Bus operations center located in Berrien Springs through the contract with TMI. Children age two and younger ride free of charge. Senior citizens and persons with disabilities ride at a rate reduced by 50 percent.

Berrien Bus services are heavily dependent on farebox revenue generated through contracts with local human service agencies. This revenue is used as local match for securing federal and state grant funds (discussed in detail in Chapter 5). In FY2013 over 23 percent of the farebox revenue for Berrien Bus was generated through these contracts, so any loss of this funding without an alternative local source would have a significant impact on current Berrien Bus services.

Since Berrien Bus is dependent on contracts with human service agencies, its scheduled services are largely based on routes that meet the needs of these agencies and they change frequently to accommodate agency needs. A snapshot of these routes is depicted in Figure 4-3, though again these routes change often. These routes are further discussed as part of the Operations Plan included later in this chapter.

Schedule and Dispatch Procedures

Berrien Bus is scheduled on a 24 hours in advance basis. Trips are scheduled no more than seven days in advance. When customers call they are given a 15 to 20 minute window that the bus will arrive at their location. Drivers will wait three minutes for the customer. For the return trip the bus will arrive within 15 minutes of the scheduled time.

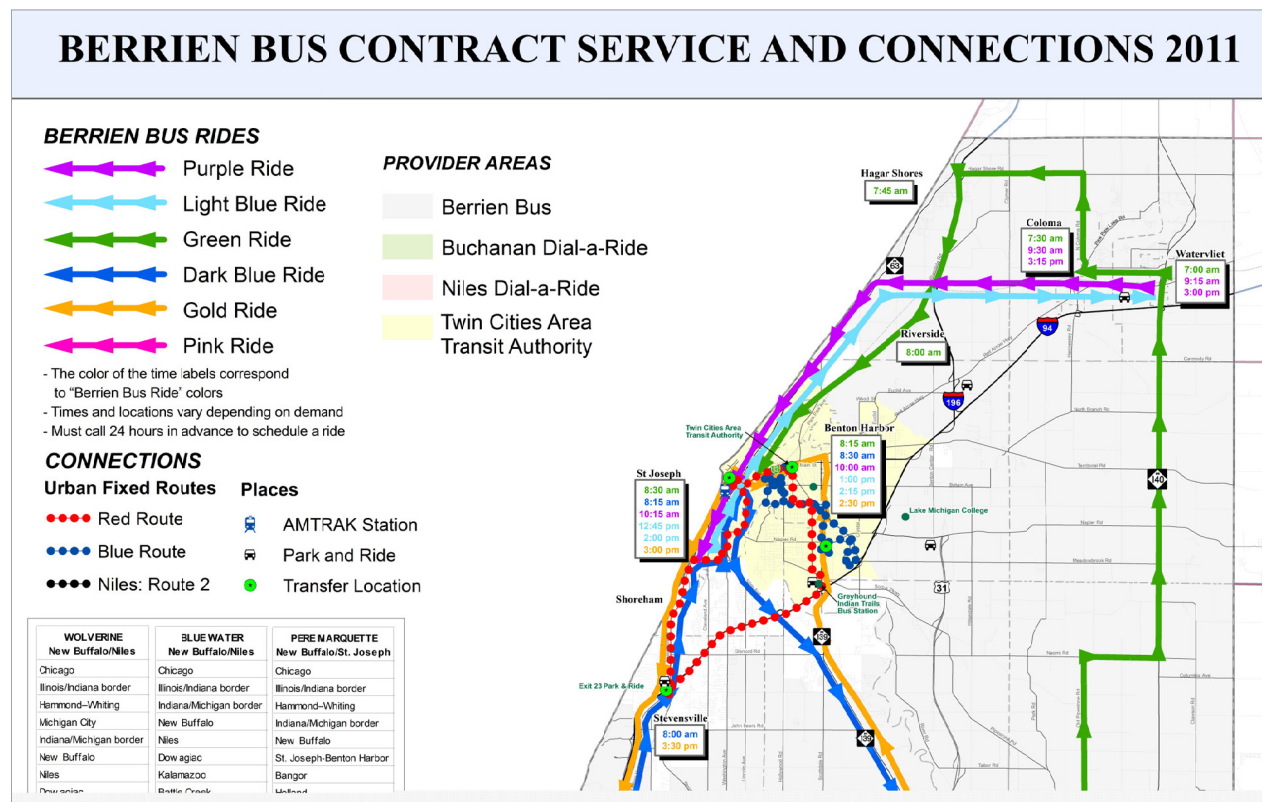
The caller information (name, requested pick up/return time and date, pick up and drop off address) is taken down by pencil on a color coded intake form. Each day of the week has a specific color for the intake form. This information is then transferred to a driver log. The driver marks the actual pick up/drop off times on this log and also on the driver manifest. The driver manifest also accounts for fares charged as well as vehicle mileage for the entire shift.

As part of a coordinated procurement effort organized by SWMPC, Berrien Bus also obtained Dial-A-Ride Online paratransit scheduling software. Berrien Bus claims that the software package has bugs and has had problems using it to schedule trips. They do enter the trip request and data into the software package to help organize data needed for quarterly reporting.

Origins, Destinations, and Trip Purposes

Within the Berrien Bus service area most trip origins are in low density areas, mainly small towns or rural single family homes. There are several individuals that have regularly scheduled service, but there are no “major” trip origin locations where riders board the bus. As noted earlier, many trips serve the human service agencies that contract service with Berrien Bus. Berrien Bus can serve these locations several times a day. There is also demand generated by older adults accessing senior and congregate meal centers across the County.

Figure 4-3: Berrien Bus



Buchanan Dial-A-Ride

Routes, Schedules, Fares, and Reservation Policies

Buchanan Dial-A-Ride is a same day curb-to-curb shared ride transportation service that provides service to the residents of the City of Buchanan and Buchanan Township. The service operates from 7:00 a.m. to 5:30 p.m. Monday through Friday and 9:00 a.m. to 3:00 p.m. on Saturdays. Customers must schedule trips at least one hour before the desired departure time.

For the general public the Buchanan Dial-A-Ride fare is \$1.50 within the city limits of Buchanan and \$4 beyond one mile past the city limits. Seniors age 60 or older, children age 12 and younger, and persons with a disability use a rate discounted by 50 percent. Students attending a school activity pay \$1.00.

A fixed schedule same day curb-to-curb shuttle service is also provided for Buchanan residents traveling to and from the City of Niles. The service offers four runs on weekdays and three runs on Saturdays. Fares range from \$1.50 to \$4.00 with a 50 percent discount to qualifying customers. Every Wednesday Harding's Grocery pays Buchanan Dial-A-Ride \$10.00 to bring senior citizens to the store for free to go grocery shopping.

Schedule and Dispatch Procedures

Buchanan Dial-A-Ride is operated by TMI out of the Berrien Bus offices in Berrien Springs. Because the Buchanan service is "same day" and Berrien Bus requires 24-hour notice, the dispatch process is slightly different. Scheduling is done in real time. When a customer calls in, the dispatcher uses an intake form color coded for the day of the week, and records the name of the rider, requested pick up/return time, pick up address, and drop off address. The dispatcher communicates the information to the driver and recopies the information on the dispatch log sheet. The driver uses a manifest to log the trip information.

Origins, Destinations, and Trip Purposes

The primary clientele of Buchanan Dial-A-Ride is senior citizens living in the Buchanan area. As a result, the major trip origins are the residence of regular customers be it single family households or senior living housing developments. The major destinations consist of doctors' offices, the grocery store, the library, and the Walmart in Niles. Primary trip purposes are for doctor's appointments and shopping.

Niles Dial-A-Ride

Routes, Schedules, Fares, and Reservation Policies

Niles Dial-A-Ride is a small urban/rural transit provider that provides same day curb-to-curb service to the general public in the City of Niles and Niles Township. Niles Dial-A-Ride also operates a linear fixed route connecting the City of Niles to Indiana. The fixed route service leaves Niles on the hour from 10:00 a.m. to 5:00 p.m. Monday through Friday. This route is detailed in Figure 4-4.

Fares for fixed route services are \$2.00 and curb-to-curb services cost \$3.00 within the City of Niles and \$4.00 beyond the city limits. Fares are reduced by 50 percent for senior citizens, children age 2 to 11, and persons with disabilities. Children under the age of two ride for free. The service hours are from 7:00 a.m. to 5:00 p.m. Monday through Friday and 10:00 a.m. to 3:00 p.m. on Saturdays. Curb-to-curb customers must call dispatch at least one hour in advance of their requested trip.

Schedule and Dispatch Procedures

Niles Dial-A-Ride recently implemented computer dispatch software. Previously, intake cards were used to schedule and dispatch rides that were assigned to drivers one at a time.

Origins, Destinations, and Trip Purposes

Many of the popular trip origins in Niles are senior housing developments in single family neighborhoods. Walmart and grocery stores are the most popular destinations. Niles Dial-A-Ride also has a route that connects to the South Bend transit system in northern Indiana that is popular during the school year.

OPERATING DATA

- Table 4-1 provides operating data for the four transit systems for FY2011 through FY2013. Some ridership trends gleaned from the data include the following:
- Overall public transit ridership in Berrien County grew about 5 percent between FY2011 and FY2013.
- Not surprisingly, the majority of the ridership was on TCATA services provided in the more urbanized area of the County, ranging from about 64-68 percent of the passenger trips provided in Berrien County during the three year period.
- Overall ridership on TCATA services increased a little over 10 percent between FY2011 and FY2013. While fixed route ridership was only about 19 percent of total trips provided by TCATA in FY2013, ridership on these routes did increase by 32 percent between FY2011 and FY2013.
- Ridership on Berrien Bus, Buchanan Dial-A-Ride, and Niles Dial-A-Ride decreased during the three year period. Trips provided by Berrien Bus decreased by a little over 4 percent between FY2011 and FY2013. Buchanan Dial-A-Ride ridership decreased about 16 percent between FY2011 and FY2013, and trips provided by Niles Dial-A-Ride decreased by about 3 percent.

Figure 4-4: Niles Dial-A-Ride

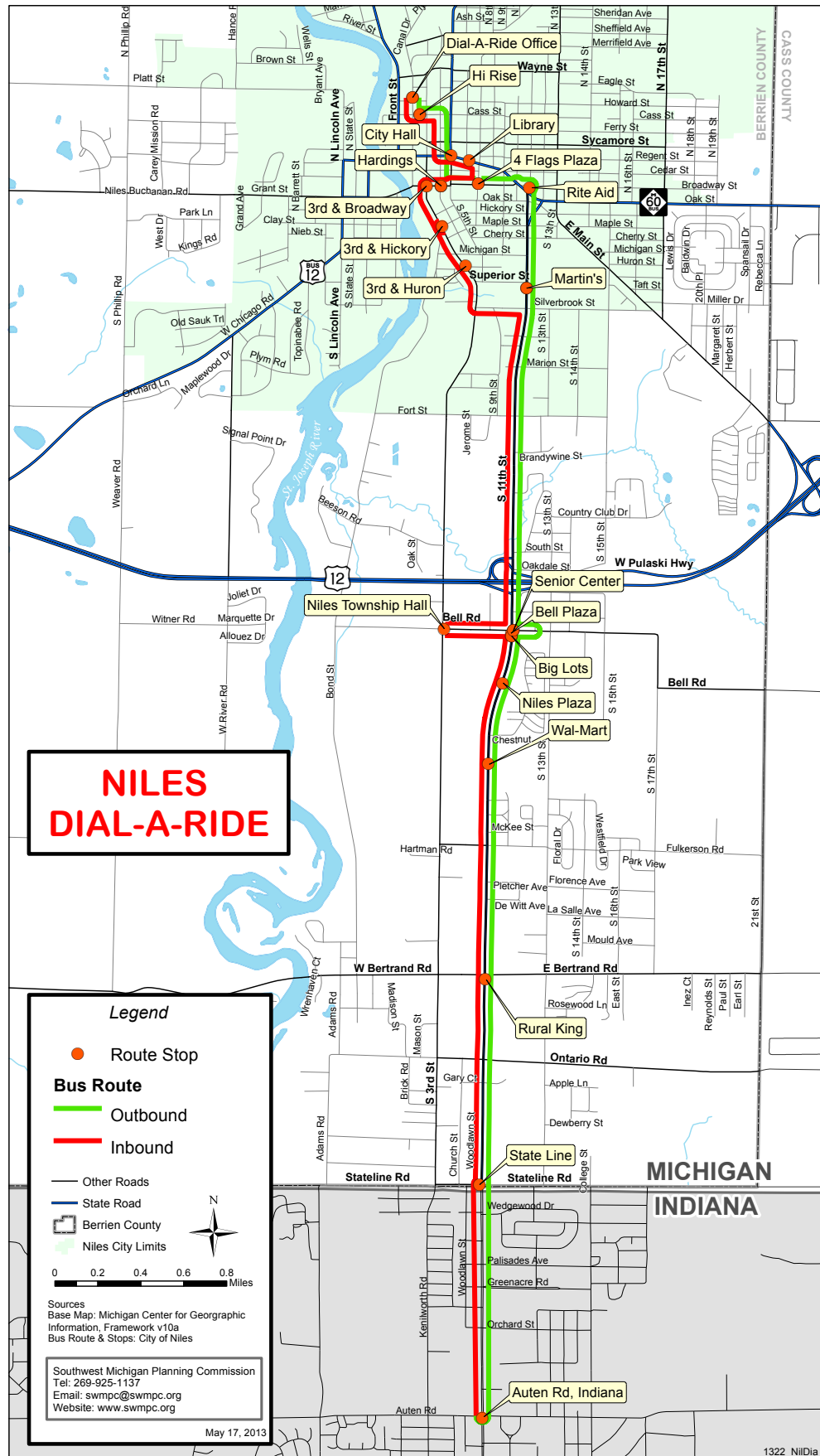


Table 4-1: Operating Data for Transit Services in Berrien County

	FY 2011			FY 2012			FY 2013		
	Trips	Vehicle Hours	Vehicle Miles	Trips	Vehicle Hours	Vehicle Miles	Trips	Vehicle Hours	Vehicle Miles
TCATA									
Fixed route - Weekday	28,697	7,548	141,836	33,334	7,434	153,511	37,988	7,628	153,621
Fixed route - Saturday	3,460	658	10,488	4,403	697	11,924	4,678	676	11,482
Dial-a-Ride - Weekday	149,998	37,487	454,533	149,393	36,742	436,261	153,463	37,418	455,770
Dial-a-Ride - Saturday	16,194	3,315	22,545	17,161	3,738	24,878	23,038	3,636	27,625
Total	198,349	49,008	629,402	204,291	48,611	626,574	219,167	49,358	648,498
Berrien Bus									
Weekday	52,799	18,128	374,380	49,783	17,810	384,979	50,701	18,590	405,728
Saturday	9,580	206	2,640	13,510	413	5,204	10,373	176	2,160
Sunday	3,288	194	2,505	1,627	181	1,951	1,403	59	632
Total	65,667	18,528	379,525	64,920	18,404	392,134	62,477	18,825	408,520
Buchanan Dial-a-Ride									
Weekday	8,562	3,411	41,776	7,726	3,345	38,843	7,167	3,467	35,628
Saturday	989	360	4,794	906	373	4,541	933	376	4,224
Total	9,551	3,771	46,570	8,632	3,718	43,384	8,100	3,843	39,852
Niles Dial-a-Ride									
Weekday	30,068	7,438	100,296	29,519	7,251	99,217	29,198	7,183	92,692
Saturday	1,941	486	5,840	2,125	495	6,330	1,882	496	5,923
Total	32,009	7,924	106,136	31,644	7,746	105,547	31,080	7,679	98,615
Total	305,576	79,231	1,161,633	309,487	78,479	1,167,639	320,824	79,705	1,195,485
Source: Individual system reports to MDOT.									

Performance Data

Transit services are typically evaluated for both efficiency (doing things right) and effectiveness (doing the right things). Efficiency is usually analyzed by:

- Operating Cost Per Hour – total cost of operations with respect to total service hours, which is calculated as the time when the driver pulls out for service until the driver returns from service.
- Operating Cost Per Mile – total cost of operations with respect to total service miles, which is calculated as miles from driver pull-out to driver pull-in, which includes deadhead mileage.
- Operating Cost Per Passenger Trip – total cost of operations with respect to total ridership, which is calculated as each passenger boarding counted as one passenger trip.
- Farebox Recovery – total farebox receipts with respect to total operating cost.

Effectiveness emphasized by passenger productivity is usually analyzed by:

- Passenger Trips Per Mile – total passenger trips with respect to the total service miles. This is typically in urban areas.

- Passenger Trips Per Hour – total passenger trips with respect to the total service hours. Typically used in rural systems.

Table 4-2 provides an overview of the performance data for each system in Berrien County for the FY2011 through FY2013 period. Using standard performance measures for public transit in small urban and rural areas, this operating data was reviewed for efficiency and effectiveness. The following areas were identified as areas that exceeded or did not meet typical industry standards (categories not noted fell within normal or acceptable ranges).

Table 4-2: Performance Data for Transit Services in Berrien County

	Total Operating Expenses	Cost per Hour	Cost per Mile	Cost per Trip	Trips per Hour	Trips per Mile	Farebox Recovery
FY 2011							
TCATA							
Fixed route (Line Haul)	\$381,929	\$46.54	\$2.51	\$11.88	3.92	0.21	6%
Dial-a-Ride	\$1,884,553	\$46.19	\$3.95	\$11.34	4.07	0.35	15%
Berrien Bus	\$859,456	\$46.39	\$2.26	\$13.09	3.54	0.17	5%
Buchanan Dial-a-Ride	\$195,355	\$51.80	\$4.19	\$20.45	2.53	0.21	8%
Niles Dial-a-Ride	\$489,065	\$61.72	\$4.61	\$15.28	4.04	0.30	12%
FY 2012							
TCATA							
Fixed route (Line Haul)	\$376,132	\$46.26	\$2.27	\$9.97	4.64	0.23	7%
Dial-a-Ride	\$1,861,504	\$45.99	\$4.04	\$11.18	4.11	0.36	17%
Berrien Bus	\$1,108,364	\$60.22	\$2.83	\$17.07	3.53	0.17	34%
Buchanan Dial-a-Ride	\$198,949	\$53.51	\$4.59	\$23.05	2.32	0.20	6%
Niles Dial-a-Ride	\$406,483	\$52.48	\$3.85	\$12.85	4.09	0.30	15%
FY 2013							
TCATA							
Fixed route (Line Haul)	\$368,752	\$44.41	\$2.23	\$8.64	5.14	0.26	8%
Dial-a-Ride	\$1,886,315	\$45.95	\$3.90	\$10.69	4.30	0.37	17%
Berrien Bus	\$1,190,587	\$63.24	\$2.91	\$19.06	3.32	0.15	30%
Buchanan Dial-a-Ride	\$198,478	\$51.65	\$4.98	\$24.50	2.11	0.20	6%
Niles Dial-a-Ride	\$430,494	\$56.06	\$4.37	\$13.85	4.05	0.32	14%

Some strong performance indicators include:

- Trips per hour on TCATA's Dial-A-Ride service (4.30 in FY2013) and on Niles Dial-A-Ride service (4.05 in FY2013) exceeded common industry norms (usually about four trips per hour for a demand-response type service).
- Trips per mile for TCATA's Dial-A-Ride service (.37 in FY2013) and on Niles Dial-A-Ride service (.32 in FY2013) also exceed traditional performance measures of .25 trips per mile for demand-response type services.
- Between FY2011 and FY2013 cost per hour, cost per mile, and cost per trip decreased on TCATA services while trips per mile and hour increased.
- The farebox recovery ratio of 30 percent for Berrien Bus in FY2013 exceeds typical rural service performance standards, however this can be attributed primarily to the revenue from contracts with human service agencies.

Some categories where the performance indicators do not meet typical measures include:

- Cost per trip on TCATA's fixed route services (\$11.88 to \$8.64) is higher than industry norms (usually less than \$7.25). Trips per hour and trips per mile increased during the three year period, however the FY2103 data of 5.14 trips per hour and .26 trips per mile are still lower than industry norms of at least eight trips per hour and at least .65 trips per mile in small urban areas with fixed route services. While ridership on the fixed routes increased during the three year period, this may be the result of the availability of both fixed route and Dial-a Ride services in the Benton Harbor area. The effectiveness of the fixed routes may suffer from this arrangement.
- Cost per mile (\$4.98 in FY2013) and cost per trip (\$24.50) for Buchanan Dial-A-Ride were higher than industry norms (usually in the \$3.00 range per mile and \$15.50 per trip for demand-response type services).
- Cost per hour for Berrien Bus (\$63.24 in FY2013) is higher than typical costs (around \$50.00 per hour). Cost per trip of \$19.06 is also higher than typical performance standards of \$15.50.
- Niles Dial-A-Ride's cost per hour of \$56.06 in FY2013 is higher than the norm of \$50.00 per hour. However this is a decrease from \$61.72 per hour in FY2011. Cost per mile of \$4.37 is higher than the industry norm of about \$3.00, but again is lower than the \$4.61 reported in FY2011.

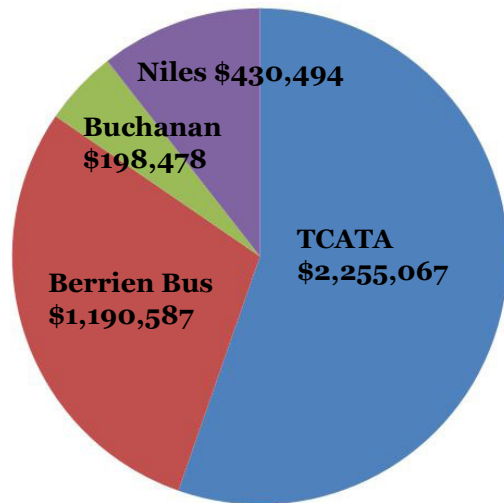
Operating Expenses

Table 4-3 provides a cumulative look at operating expenses reported by the four transit systems in Berrien County for FY2011 through FY2013. Operating expenses by individual transit system are included in Appendix H. As indicated in Table 4-3, over \$4 million was spent providing public transit in Berrien County in FY2013 (with gaps in transportation still remaining). Figure 4-5 provides a breakdown of the expenses per system in FY2013.

Table 4-3: Total Operating Expenses for Transit Services in Berrien County

	Operations	Maintenance	General Admin	Total
FY 2011				
TCATA	\$1,562,123	\$386,732	\$317,627	\$2,266,482
Berrien Bus	\$603,302	\$86,296	\$169,858	\$859,456
Buchanan Dial-a-Ride	\$134,645	\$15,015	\$45,695	\$195,355
Niles Dial-a-Ride	\$323,365	\$98,728	\$66,972	\$489,065
Total	\$2,623,435	\$586,771	\$600,152	\$3,810,358
FY 2012				
TCATA	\$1,618,996	\$376,017	\$242,623	\$2,237,636
Berrien Bus	\$852,532	\$103,175	\$152,657	\$1,108,364
Buchanan Dial-a-Ride	\$136,669	\$15,935	\$46,345	\$198,949
Niles Dial-a-Ride	\$206,685	\$116,096	\$83,702	\$406,483
Total	\$2,814,882	\$611,223	\$525,327	\$3,951,432
FY 2013				
TCATA	\$1,575,239	\$409,531	\$270,297	\$2,255,067
Berrien Bus	\$919,741	\$97,824	\$173,022	\$1,190,587
Buchanan Dial-a-Ride	\$131,585	\$17,059	\$49,834	\$198,478
Niles Dial-a-Ride	\$216,991	\$127,228	\$86,275	\$430,494
Total	\$2,843,556	\$651,642	\$579,428	\$4,074,626

Figure 4-5: Expenses by System, FY 2013



CURRENT MAINTENANCE PROCEDURES

As indicated in the current staffing levels provided in Chapter 3, each transit system has staff assigned to perform maintenance. The maintenance category includes mechanics, building and grounds repair, and janitorial in some cases. Collectively, there are six full-time positions and four part-time positions conducting maintenance. TCATA is the only agency that does not have a mechanic on staff. Despite the overall number of staff involved in maintenance responsibilities, some services are contracted out since TCATA does not perform major repairs in house.

Table 4-4 provides a review of the various maintenance functions performed at each transit system. Similar to other functions involved in the operation of a transit system, duplication occurs when four separate entities perform vehicle and building maintenance.

Table 4-4: Current Maintenance Responsibilities

	TCATA	Niles Dial-A-Ride	Buchanan Dial-A-Ride	Berrien Bus
	25 Vehicles 4 FTE Maintenance 8 Outside Contractors 2013 Expense \$409,531	6 Vehicles 1 FTE Mechanic 1 PTE Janitor 2013 Expense \$127,228	3 Vehicles 1 PTE Janitor 2 PTE Mechanics 2013 Expense \$17,059	22 Vehicles 1 PTE Janitor 2 PT Mechanics 2013 Expense \$97,824
Vehicle Cleaning Responsibility/Intervals				
Interior Sweeping	Maintenance/Daily	Driver/Daily	Driver/Daily	Driver/Daily
Interior Cleaning	Maintenance/Daily	Driver/Daily	Driver/Janitorial/Daily	Driver/Janitorial/Daily
Exterior Washing	Maintenance/Daily	Janitorial/Varies	Janitorial/Varies	Janitorial/Varies
Vehicle Maintenance Capabilities				
Preventative Maintenance	Outside Contractor 2,500-3,000 miles	Mechanic 2,500-3,000 miles	Mechanic 3,000 miles	Mechanic 3,000-7,000 miles
Major Repairs	Outside Contractor	Mechanic	Mechanic	Mechanic

	TCATA	Niles Dial-A-Ride	Buchanan Dial-A-Ride	Berrien Bus
Brake Repairs	Outside Contractor	Mechanic	Mechanic	Mechanic
Electronics Repairs	Outside Contractor	Mechanic	Mechanic/Major work is contracted	Mechanic
Engine Overhaul	Outside Contractor	Mechanic	Mechanic	Mechanic
Transmission Overhaul	Outside Contractor	Mechanic	Mechanic	Mechanic
Paint and Body Repairs	Outside Contractor	Minor work handled by mechanic; major work contracted out	Minor work handled by mechanic; major work contracted out	Minor work handled by mechanic; major work contracted out
Safety/First Aid Supplies	Outside Contractors	Mechanic/Driver	Driver	Driver
Tire Repair	Maintenance	Mechanic	Mechanic	Mechanic
Wrecker Service	Maintenance	Contracted	Contracted	Contracted
Building Interior Maintenance Cleaning Responsibility				
Janitorial	Outside Contractor	Janitorial	Janitorial	Janitorial
HVAC	Outside Contractor	Mechanic makes repairs/major work contracted out	County of Berrien	County of Berrien
Exterior Building and Property Maintenance				
Mowing	Outside Contractor	1 PTE Custodian	Janitorial	Janitorial
Snow Removal	Outside Contractor	Primarily mechanic, but janitorial assists	Janitorial	Janitorial
Window Washing	Outside Contractor	Mechanic	Janitorial	Janitorial
Landscaping	Outside Contractor	None	None	None
Bus Shelter Maintenance	Outside Contractor	None	None	None
Warranty work is contracted to dealers; wheel alignments are not done in-house. D&S Heavy Truck Repair performs all TCATA preventative maintenance and repairs. Source: SWMPC.				

TRANSIT SERVICES IN ADJACENT JURISDICTIONS

While the focus of this study is on transit services in Berrien County, one of the major unmet transportation needs identified in the Berrien County Public Transit-Human Services Transportation Plan was transportation services that cross county and state lines. This section summarizes interviews with transit providers in areas neighboring Berrien County and discusses potential coordination or connections with transit services in Berrien County.

Cass County Transit

Cass County Transit is a curb-to-curb, advance reservation county-wide public transportation system available to the general public. Cass County Transit is also operated by the TMI office in Cassopolis, Michigan. The Cass County Transportation Coordinator holds the same title in Berrien County. Cass County also coordinates some services with Niles Dial-A-Ride.

Van Buren Public Transit (VBPT)

VBPT is a public, not-for-profit transportation agency providing curb-to-curb service open to the general public. Twenty-four hour advanced reservations are provided countywide. VBPT recently completed a Public Transit Study where connections with Berrien County were a highlighted priority.

TRANSPO (South Bend, IN)

As noted earlier, the Niles Dial-A-Ride services include a route that connects the City of Niles to Indiana. Route 2 provides service to Auten Road at SR 933, allowing connections to the South Bend Public Transportation Corporation (TRANSPO) system. This connection provides the opportunity for Niles area residents (and those transferring from Berrien Bus services in Niles) to access medical, educational, and retail destinations in the South Bend area.

Niles Dial-A-Ride's Route 2 connects with TRANSPO's Route 5, and customers can use this route to make connections to the fixed route system operated by TRANSPO throughout the South Bend area. A map of TRANSPO Route 5 is located in Figure 4-6.

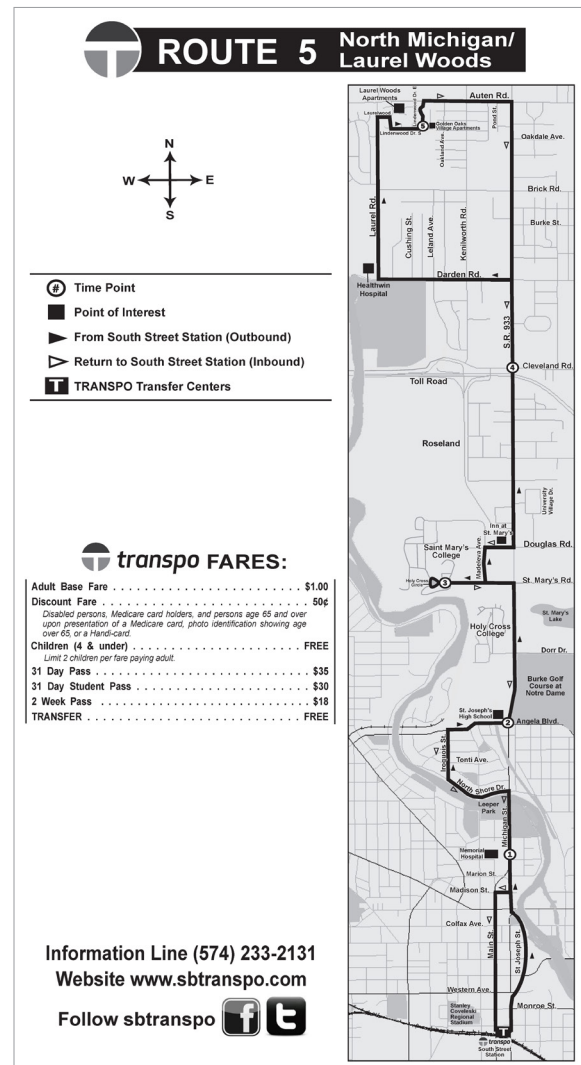
There is no formal fare connectivity agreement between Niles Dial-A-Ride and TRANSPO. Customers simply pay the appropriate fare or use the appropriate pass for each system when boarding. The number of transfers between the systems is not currently tracked.

PROPOSED VISION FOR COUNTYWIDE TRANSIT SERVICES AND OPERATIONS PLAN

As an initial step in eliminating some of the identified gaps and providing the foundation for more seamless services, the following section provides an Operations Plan that discusses current, modified, and new transit services from a countywide perspective. This Operations Plan incorporates service planning efforts conducted by SWMPC and the Transit Development Plan (TDP) recently completed for the City of Niles.

The Operations Plan is broken out by current services and modified/new services. Chapters 5 and 6 will provide the proposed companion Capital and Financial Plans to support this Operations Plan, and Chapter 7 discusses considerations related to connectivity of these services. Also, as efforts towards a countywide transit system move forward, a year for implementation of new services or modifications to current services should be identified (and are proposed in the Financial and Capital Plans).

Figure 4-6: TRANSPO Route 5



Current Services

Maintain Red Route

- TCATA currently operates this route from 6:00 a.m. to 10:00 p.m. Monday through Friday, and from 8:00 a.m. to 10:00 p.m. on Saturday.
- Continuing to operate the Red Route at current service levels would result in approximately 4,888 annual operating hours.

Maintain Blue Route

- TCATA operates this route on a 30 minute headway from 6:00 a.m. to 10:00 p.m. Monday through Friday, and from 8:00 a.m. to 10:00 p.m. on Saturday.
- Continuing to operate the Blue Route at current service levels would result in approximately 9,776 annual operating hours.

Maintain Benton Harbor Area Dial-A-Ride

- TCATA operates this service from 6:00 a.m. to 6:00 p.m. Monday through Friday, and 8:00 a.m. to 4:30 p.m. on Saturday.
- Continuing to operate the Dial-A-Ride service in the Benton Harbor area would result in approximately 16,390 annual service hours.
- These hours include ADA complementary paratransit service required for current and proposed fixed route services.

Maintain Niles Dial-A-Ride Route 2

- Niles Dial-A-Ride operates this deviated fixed route that connects Niles to services in South Bend. The route operates from 10:00 a.m. to 5:00 p.m. Monday through Friday.
- Continuing to operate this route would result in approximately 1,820 annual service hours.

Maintain Niles Dial-A-Ride

- Niles Dial-A-Ride service operates from 7:00 a.m. to 5:00 p.m. Monday through Friday, and from 10:00 a.m. to 3:00 p.m. on Saturday.
- Continuing to operate this service would result in approximately 6,104 annual service hours.

Maintain Buchanan Dial-A-Ride

- The City of Buchanan Dial-A-Ride service operates from 7:00 a.m. to 5:30 p.m. Monday through Friday, and 9:00 a.m. to 3:00 p.m. on Saturdays.
- Continuing to operate Dial-A-Ride service in the City of Buchanan would result in approximately 2,647 annual service hours.

Maintain Buchanan - Niles Shuttle

- This shuttle provides fixed schedule same day curb-to-curb service between the City of Buchanan and the City of Niles, offering four runs on weekdays and three runs on Saturdays.
- Continuing to operate this service would result in approximately 1,196 annual service hours.

Modified/New Services

Expanded Fixed Route Service in Current TCATA Service Area

- Based on conceptual routes developed by SWMPC (shown in Figure 4-7) proposed Purple, Yellow, and Green Routes would operate on a one hour headway between 6:00 a.m. to 10:00 p.m., Monday through Friday, and 8:00 a.m. to 10:00 p.m. on Saturday. A proposed Shopper Shuttle would operate on a 30 minute headway between 9:00 a.m. and 4:00 p.m., Monday through Friday.
- Expanded fixed route services in the current TCATA service area would result in approximately 18,304 annual service hours.

Niles Dial-A-Ride Expansion

- The Niles TDP recommends expanded service hours as part of Year Two service improvements.
- Expanded Dial-A-Ride services as outlined in the Niles TDP would result in 179 annual service hours.

Expanded Hours for Niles Dial-A-Ride Route 2

- Current hours on this route would be expanded from 8:00 a.m. to 7:00 p.m. Monday through Friday, and Saturday service would be implemented from 8:00 a.m. to 5:00 p.m.
- Expanded hours for this route would result in approximately 1,508 annual service hours.

Expanded Frequency on Niles Dial-A-Ride Route 2

- The Niles TDP recommends expansion of the Niles Route 2 so that the route operates on a 30 minute headway.
- Expanding the Route 2 service as outlined in the Niles TDP (taking into account the expanded hours in the previous service expansion) would result in approximately 3,328 annual service hours.

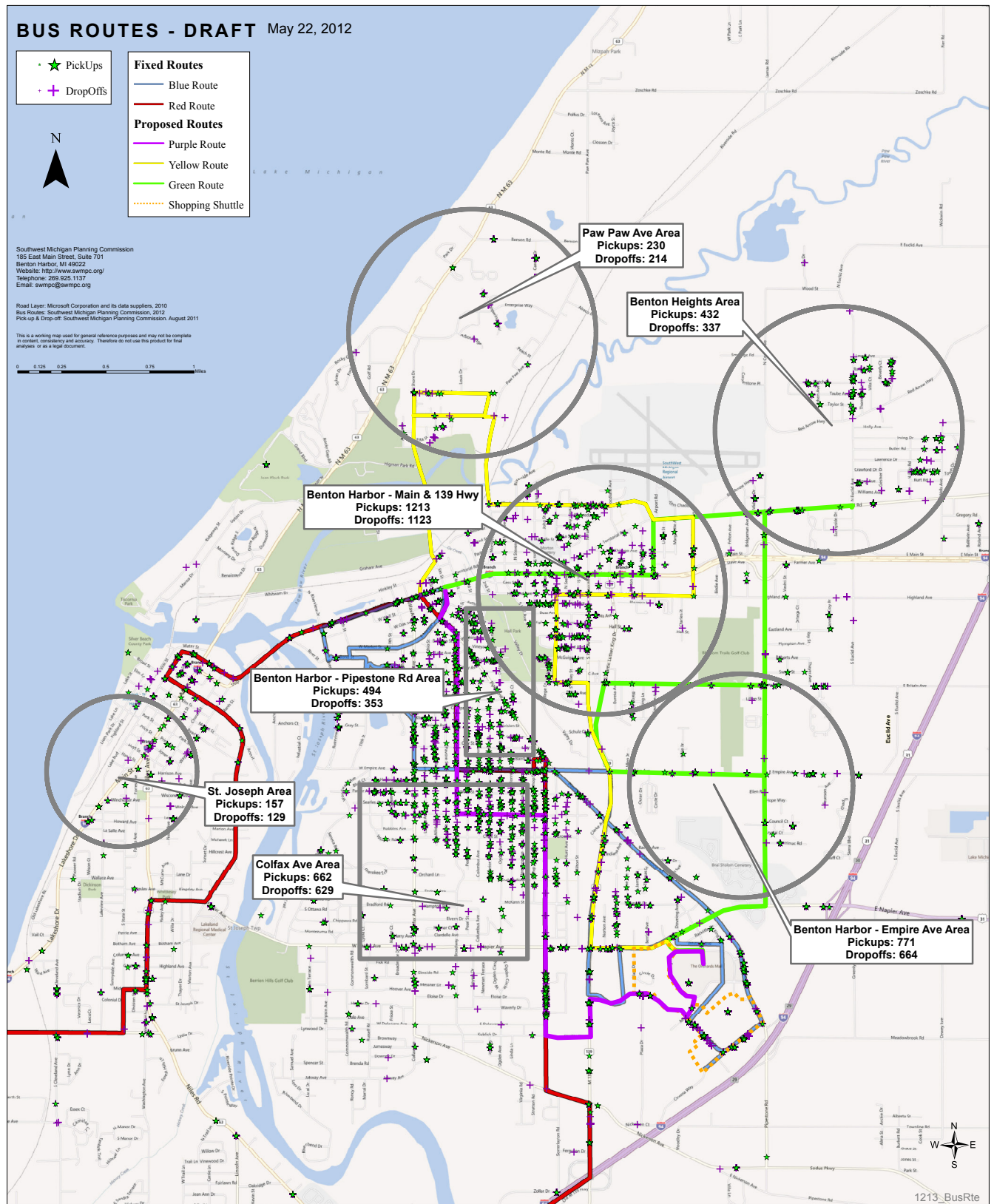
Benton Harbor/St. Joseph - Berrien Springs - Niles Shuttle

- While Berrien Bus currently provides services connecting these communities through its contracted human service routes, this shuttle would formalize the service and operate as a scheduled general public route.
- New scheduled service would connect these areas with three morning trips and three afternoon trips, Monday through Friday.
- Operating shuttle service between Benton Harbor/St. Joseph, Berrien Springs, and Niles based on this schedule would result in approximately 2,080 annual vehicle hours.

Watervliet/Coloma - Benton Harbor/St. Joseph Shuttle

- While Berrien Bus currently provides services connecting these communities through its contracted human service routes, this shuttle would formalize the service and operate as a scheduled general public route.
- New scheduled service would connect these areas with two morning trips and two afternoon trips, Monday through Friday.
- Operating shuttle service on this schedule would result in approximately 1,560 annual vehicle hours.

Figure 4-7: SWMPC Proposed Routes



Watervliet - Coloma Dial-A-Ride Service

- This new service would connect Watervliet and Coloma, and provide transfers to the Benton Harbor/St. Joseph shuttle.
- Operating this new Dial-A-Ride service would result in approximately 2,600 annual vehicle hours.

Berrien Springs Dial-A-Ride Service

- This service would connect locations within Berrien Springs and offer transfers to the Benton Harbor/St. Joseph shuttle.
- Operating this new Dial-A-Ride service would result in approximately 2,600 annual vehicle hours.

Benton Harbor/St. Joseph - Bridgman - Sawyer - New Buffalo Shuttle

- While Berrien Bus currently provides services connecting these communities through its contracted human service routes, this shuttle would formalize the service and operate as a scheduled general public route.
- New scheduled service would connect these areas with two morning trips and two afternoon trips, Monday through Friday.
- Operating the shuttle on this schedule would result in approximately 1,560 annual vehicle hours.

Modified Berrien County Demand Response Service

- Similar to the current Berrien Bus service, demand response transportation would be provided in areas and at times not served by the scheduled shuttle routes and services. This would include connections between Berrien Springs and Watervliet, and New Buffalo and Buchanan/Niles.
- Services would be coordinated with contracted human service transportation.
- Based on current service hours for Berrien Bus and taking into account proposed shuttle routes, operating this service would result in approximately 16,745 annual vehicle hours.

OVERALL PLANNING SERVICE LEVELS

Table 4-5 summarizes the levels of service planned for the proposed Operations Plan. This plan proposes 93,285 annual service hours, an increase of about 17 percent over FY2013. More information on the financing of this proposed increase in service is included in the next chapter.

Table 4-5: Planned Levels of Service

Service	Description	Projected Annual Revenue Service Hours
Existing Services		42,821
Red Route	One-hour loop through Benton Harbor, St. Joseph, St. Joseph Township, and Stevensville. Operates 6a.m. to 10p.m. M-F, 8a.m. to 10p.m. Sat.	4,888
Blue Route	One-hour loop through Benton Harbor and the Benton Township (Fairplain) retail area. Operates on a 30 minute headway. Hours are 6a.m. to 10p.m. M-F, 8a.m. to 10p.m. Sat.	9,776
Benton Harbor Area Dial-A-Ride (1)	Curb to curb service operated between 6a.m. and 6p.m., M-F, 8a.m. to 4:30p.m. Sat.	16,390
Niles Route 2	Deviated fixed route connects Niles to service in South Bend. Operates from 10a.m. to 5p.m. M-F.	1,820
Niles Dial-A-Ride (2)	Operates from 7a.m. to 5p.m. M-F, 10a.m. to 3p.m. Sat.	6,104
Buchanan Dial-A-Ride (3)	Curb to curb service operated between 7a.m. and 5:30p.m., M-F, and 9a.m. to 3p.m. on Saturday.	2,647
Buchanan - Niles Shuttle	Provides four trips between Buchanan and Niles on weekdays and three trips on Saturday.	1,196
Modified or New Services:		50,464
Expanded Fixed Route Service in Current TCATA Service Area (4)	Proposed Purple, Yellow, and Green Routes would operate on a one hour headway between 6a.m. to 10p.m. M-F and 8a.m. to 10p.m. Sat. Proposed Shopper Shuttle would operate on a 30 minute headway between 9a.m. and 4p.m. M-F.	18,304
Niles Dial-A-Ride Expansion (5)	Expanded service hours as recommended in Year Two of TDP to 6:00 a.m. to 5:30 p.m., M-F, and to 10a.m. to 4p.m. Sat.	179
Expanded Hours for Niles Route 2 Service	Expand hours of operation to 8a.m. to 7p.m., M-F, and implement Saturday service from 8a.m. to 5p.m.	1,508
Expanded Frequency on Niles Route 2 Service	Additional vehicle on route to decrease headway to 30 minutes as recommended in Year Three of TDP.	3,328
Benton Harbor/St. Joseph - Berrien Springs - Niles Shuttle	New scheduled service would connect these areas with three morning trips and three afternoon trips, M-F.	2,080
Watervliet/Coloma - Benton Harbor/St. Joseph Shuttle	New scheduled service would connect these areas with two morning trips and two afternoon trips, M-F.	1,560
Watervliet - Coloma Dial-A-Ride Service	New service would connect these communities and offer transfers to shuttle to Benton Harbor/St. Joseph.	2,600
Berrien Springs Dial-A-Ride Service	New service would connect locations within Berrien Springs and offer transfers to shuttle to Benton Harbor/St. Joseph.	2,600
Benton Harbor/St. Joseph - Bridgman - Sawyer - New Buffalo Shuttle	New scheduled service would connect these areas with two morning trips and two afternoon trips, M-F.	1,560
Berrien County Demand Response Service (6)	Provided in areas not served by other routes and services, including connections between Berrien Springs and Watervliet, and New Buffalo and Buchanan/Niles. Services coordinated with contracted human service transportation.	16,745
Total Proposed Service Hours:		93,285
<p>(1) Based on FY2013 total hours minus projected fixed route hours. Includes ADA complementary paratransit service required for fixed route services. Includes ADA complementary paratransit service required for fixed route services.</p> <p>(2) Based on FY2013 total hours minus projected hours for Niles Route 2.</p> <p>(3) Based on FY2013 total hours minus projected hours for Buchanan - Niles shuttle service.</p> <p>(4) Based on SWMPC conceptual routes.</p> <p>(5) Based on projected hours in Niles TDP.</p> <p>(6) Based on FY2013 hours minus projected hours for proposed scheduled shuttle services.</p>		

Chapter 5

FUNDING CONSIDERATIONS/ FINANCIAL PLAN

This chapter begins with a review of the variety of funding sources that support public transit services in Berrien County and discusses current funding arrangements. Under the governance option in which the BCTA would be established only for the area of the County currently served by Berrien Bus, the current transit system funding process would change very little. The only modification would be that the funding programs that are currently administered by the County would instead go to the BCTA. Therefore, when discussing these funding programs the implications related to a broader countywide structure are highlighted for future consideration.

After describing the funding programs, this chapter details the revenue amounts for the four transit systems, discusses millage implications, and proposes a conceptual budget for a countywide transit program in comparison to the current four system arrangement. This chapter concludes with a proposed five year Financial Plan for funding existing and expanded transit services as presented in Chapter 4.

FEDERAL FUNDING PROGRAMS

The *Moving Ahead for Progress in the 21st Century (MAP-21)* legislation that went into effect on October 1, 2012 contained changes to several federal transit funding programs. Changes that are most relevant to a countywide transit system in Berrien County are appropriately noted.

Urbanized Area Formula Grants (Section 5307)

Section 5307 provides grants to urbanized areas (over 50,000 population) for public transportation capital, planning, job access and reverse commute projects, as well as operating expenses in certain circumstances. Funds are apportioned on a formula basis. For areas of 50,000 to 199,999 in population, the formula is based on population, population density, and the number of low-income individuals. For areas with populations of 200,000 and more, the formula is based on a combination of bus revenue vehicle miles, bus passenger miles, fixed guideway revenue vehicle miles, and fixed guideway route miles, as well as population, population density, and the number of low-income individuals. The federal share is 80 percent for capital assistance and 50 percent for operating assistance.

The MAP-21 legislation resulted in several changes to Section 5307. These included:

- Operating costs are eligible expenses, up to certain limits, for grantees in areas with populations greater than 200,000 that operate a maximum of 100 buses in fixed route service during peak hours.
- Funding provided by other government agencies or departments that are eligible to be expended on transportation may be used as local match.

Current Conditions:

- TCATA is the direct recipient of Section 5307 funds for the Benton Harbor-St. Joseph urbanized area. While TCATA currently receives 100 percent of the Section 5307 grant award for the Benton Harbor/St. Joseph urbanized area, TCATA Dial-A-Ride provides service to approximately 53 percent of the urbanized area. As documented through a letter of understanding between Berrien County and TCATA, the County declines its share of the Section 5307 funds for the unserved area. A copy of this letter is included in Appendix I. As a result of this agreement, as depicted by SWMPC in Figure 5-1, 47 percent of the urbanized area receives little or no service.
- A Memorandum of Understanding between SWMPC, the Michigan Area Council of Governments (MACOG), the City of Niles, and TRANSPO defines the process by which Section 5307 funds are divided within the South Bend urbanized area. The City of Niles has an agreement with TRANSPO on the allocation of these funds. Copies of the MOU and the agreement between the City of Niles and TRANSPO for 2012 are in Appendix J.
- TCATA currently receives funds through the Job Access and Reverse Commute (JARC) program. MAP-21 eliminated this program, though projects that provide transportation to jobs and employment opportunities for welfare recipients and low income workers are now an eligible activity through Section 5307.

Countywide Transit System Considerations:

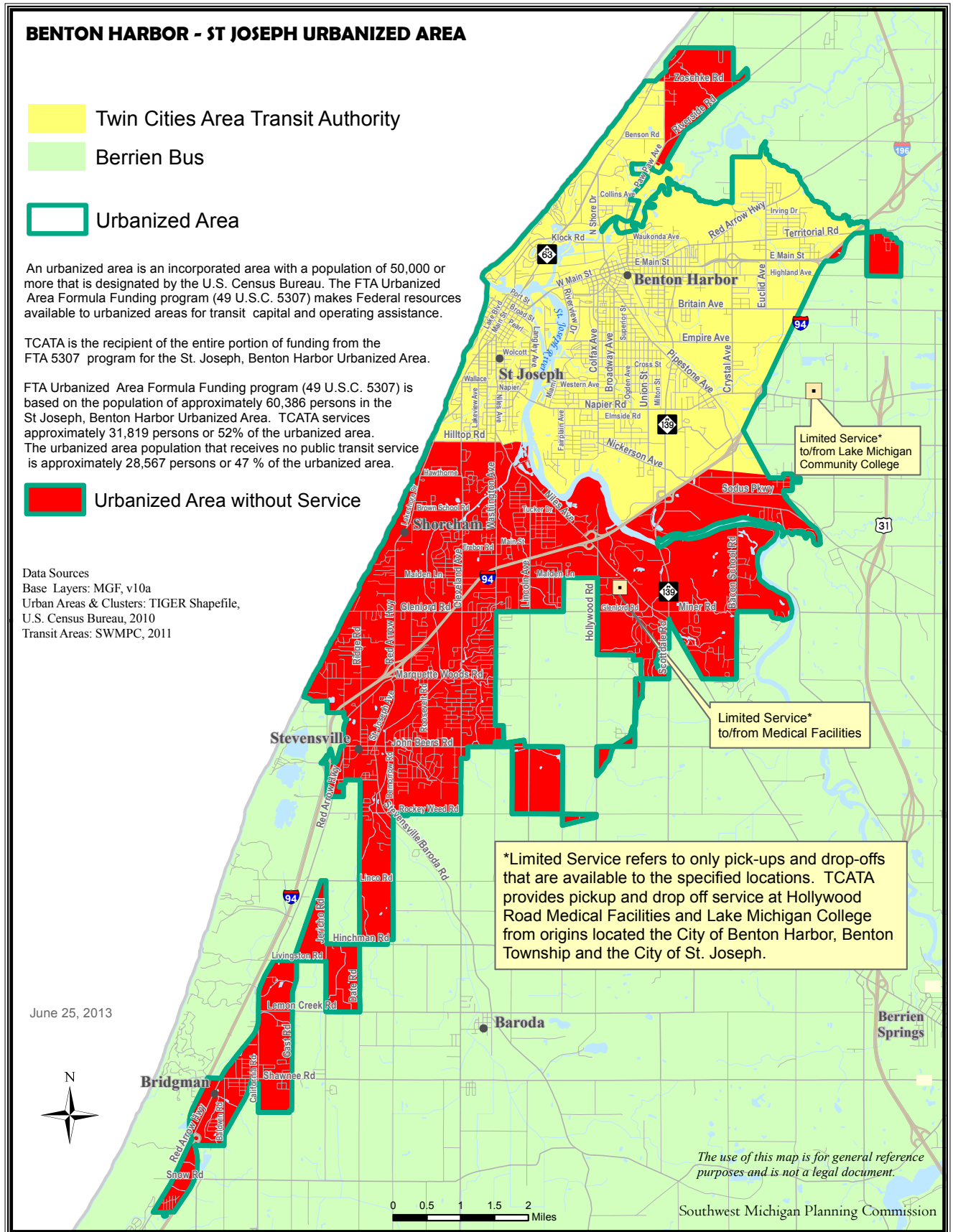
- A countywide entity could serve as the recipient for Section 5307 funds in Berrien County. For funds to the Benton Harbor-St. Joseph urbanized area, current funding agreements could be readdressed in an effort to provide service throughout the area. For the South Bend urbanized area funds, appropriate agreements would be established with SWMPC, MACOG, and TRANSPO and between the countywide system and TRANSPO.
- FTA guidance states that in cases where an entity is the recipient of both Section 5307 and Section 5311 funds (described later in this section) and operates services in both urbanized and nonurbanized areas, the grantee must develop a process for allocating operating costs between the two FTA funding sources. Therefore, a countywide transit system would need to have such as allocation model in place. FTA guidance also states that the recipient of funds through both programs should apply this procedure to “joint” capital projects such as vehicle purchases.
- With elimination of JARC, it is anticipated a countywide transit system would use Section 5307 funds for job access related services.

Enhanced Mobility of Seniors and Individuals with Disabilities Program (Section 5310)—Previously the Elderly and Disabled Program

Funds through Section 5310 are apportioned for urbanized and rural areas based on the number of seniors and individuals with disabilities, with 60 percent of the funds apportioned to designated recipients in urbanized areas with populations larger than 200,000, 20 percent to states for use in urbanized areas of fewer than 200,000 persons, and 20 percent to states for use in rural areas. The federal share for capital projects is 80 percent and for operating grants is 50 percent.

In addition to eliminating JARC, MAP-21 also repealed Section 5317 (the New Freedom program) and established an enhanced Section 5310. The modified Section 5310 now serves as single formula program to support the mobility of seniors and individuals with disabilities, providing funds for programs to serve the special needs of transit-dependent populations beyond traditional public transportation services and Americans with Disabilities Act (ADA) complementary paratransit services. Section 5310 recipients must certify that projects selected are included in a locally developed, coordinated public transit-human services transportation plan.

Figure 5-1 Benton Harbor Urbanized Area with Service Areas



Under the MAP-21 legislation, eligible subrecipients for Section 5310 are states or local government authorities, private non-profit organizations, or operators of public transportation services that receive a grant indirectly through a recipient. MAP-21 also modified eligible activities under Section 5310:

- At least 55 percent of program funds must be used on capital projects that:
 - Are public transportation projects planned, designed, and carried out to meet the special needs of seniors and individuals with disabilities when public transportation is insufficient, inappropriate, or unavailable.
- The remaining 45 percent may be used for:
 - Public transportation projects that exceed ADA requirements.
 - Public transportation projects that improve access to fixed route service and decrease reliance by individuals with disabilities on complementary paratransit.
 - Alternatives to public transportation that assist seniors and individuals with disabilities.

Current Conditions:

None of the current transit systems receive funding through Section 5310. However, TCATA has received New Freedom funds that were used for the mobility management position housed at SWMPC.

Countywide Transit System Considerations:

- With the modifications to Section 5310, all of the current transit systems in Berrien County would be eligible subrecipients. However, funding for the program is through a competitive application process administered by MDOT. Therefore, it is anticipated that one application from a countywide entity, as opposed to separate ones, would be more likely to be funded by MDOT.
- The 2009 Berrien County Public Transit-Human Services Transportation Plan includes a variety of strategies and potential projects that a countywide transit system could consider, and then apply for Section 5310 funds.
- While JARC-related services will be eligible under Section 5307 and 5311, and New Freedom activities will be eligible under the modified Section 5310, the federal guidance in regard to this funding program is still pending. While it is anticipated that some funding through Section 5310 would be available to Berrien County, it is unclear what this amount would be to support current providers or a countywide transit system. Consequently, the projected revenues for a countywide system provided later in this chapter includes a line item for potential funding through Section 5310, but no amount is listed.

Formula Grants for Rural Areas (Section 5311)

Section 5311 provides capital, planning, and operating assistance to states to support public transportation in rural areas with populations less than 50,000. Funds are apportioned on a formula basis, with 83.15 percent of funds apportioned on land area and population in rural areas, and 16.85 percent of funds apportioned based on land area, revenue-vehicle miles, and low-income individuals in rural areas. Capital expenses are funded at up to 80 percent of net project costs, while operating expenses are funded at up to 50 percent of net project costs.

With the repeal of JARC under MAP-21, low-income populations in rural areas are now incorporated as a formula factor and job access related projects are an eligible project under Section 5311.

Current Conditions:

- Berrien County receives Section 5311 funds through MDOT.

Countywide Transit System Considerations:

- A countywide transit system could serve as the subrecipient of Section 5311 funds for the County. As noted for Section 5307, as the recipient of both Section 5307 and 5311 funds, a process would need to be developed for allocating operating costs between the two FTA funding sources and for joint capital projects. Revenue from contracts with human service agencies could continue to serve as local match for the program funds.

STATE FUNDING PROGRAMS

Local Bus Operating Assistance Program

The primary source of state funding for transit services in Berrien County is the Local Bus Operating Assistance Program administered by MDOT. While this program can reimburse transit systems up to 60 percent of eligible expenses, according to MDOT the current percentage is 38.49. *MDOT anticipates that this percentage will remain about the same in future years, so it was used to project state funding for a countywide system.*

Current Conditions:

- Each of the four current transit systems in Berrien County receives funding from MDOT through this program. Each applies and reports separately to MDOT.

Countywide Transit System Considerations:

- A countywide transit system could serve as the single point of contact with MDOT for this and all other state programs, and would apply for funding and submit reports for the County. This arrangement would be especially important if legislation being considered at the state level to decrease MDOT funding to any counties with multiple transit systems is approved. For example, House Bill No. 5306 included the following draft language:

“Starting with the fiscal year that begins at least 12 months after the date the amendatory act that added this subdivision is enacted, if there is more than 1 eligible authority or agency in a county, the department shall reduce the annual distribution amount for each eligible authority or agency in the 25 county by 10%. A reduction under this subdivision shall be taken after the annual distribution amount has been calculated for the eligible authority or agency.”

Specialized Services Program

MDOT also administers the Specialized Services Program that provides operating assistance to private, nonprofit agencies, and public agencies providing transportation services primarily to elderly persons and persons with disabilities.

Current Conditions:

- None of the current transit providers in Berrien County receive funding through the MDOT Specialized Service Program, though other counties in the region do receive funding through this program.

Countywide Transit System Considerations:

- A countywide transit system could apply to MDOT for funds through this program. If successful this may help offset any local funding issues or expand services to meet the growing mobility needs of older adults and people with disabilities. *While a countywide transit system should explore possible funding through this program in the future, for purposes of developing a revenue plan no amounts were projected.*

LOCAL FUNDING/MILLAGES

TCATA, Buchanan Dial-A-Ride, and Niles Dial-A-Ride are currently supported through a local millage. The millage rate is the rate at which property taxes are levied on property, and a mill is 1/1000 of a dollar. Figure 5-2 provides a map produced by SWMPC that depicts the areas of the County where millages are collected and the current rates.¹

To support a countywide transit system, the following arrangements can be considered:

- Continue current millages, with funding going to a countywide entity. An important component of this arrangement would be the assurance that these communities would at a minimum maintain the same level of service they currently receive.
- Continue current millages and implement a millage to cover the remaining areas of the County. This arrangement would ensure local funding for the entire County. However, it would require consideration of service levels to ensure all communities in the County were comfortable with the amount of service they were receiving for the amount of money their constituents were contributing to the millage.
- Eliminate the current millages and implement a countywide one. This arrangement would help to establish a true countywide transit system that views and responds to mobility needs from a broader perspective. However, there would be legislative implications and coordination involved with eliminating the present millages and developing a new one for voter approval.
- A countywide transit system would work best if it was implemented in conjunction with a countywide millage. There is a precedent in that a countywide millage is in place to support services provided through senior centers in Berrien County. In August 2012, this millage was renewed by Berrien County residents, with over 78 percent of voters supporting the measure.²

An additional consideration is that some areas of the County outside the communities with a millage have provided funding for services specific to their jurisdiction. For instance, in FY2010 the City of Bridgman contracted with Berrien Bus to operate service in the City. A countywide millage would help to blend various pots of local money and to ensure uniform services and funding throughout the County.

BCTA Implications

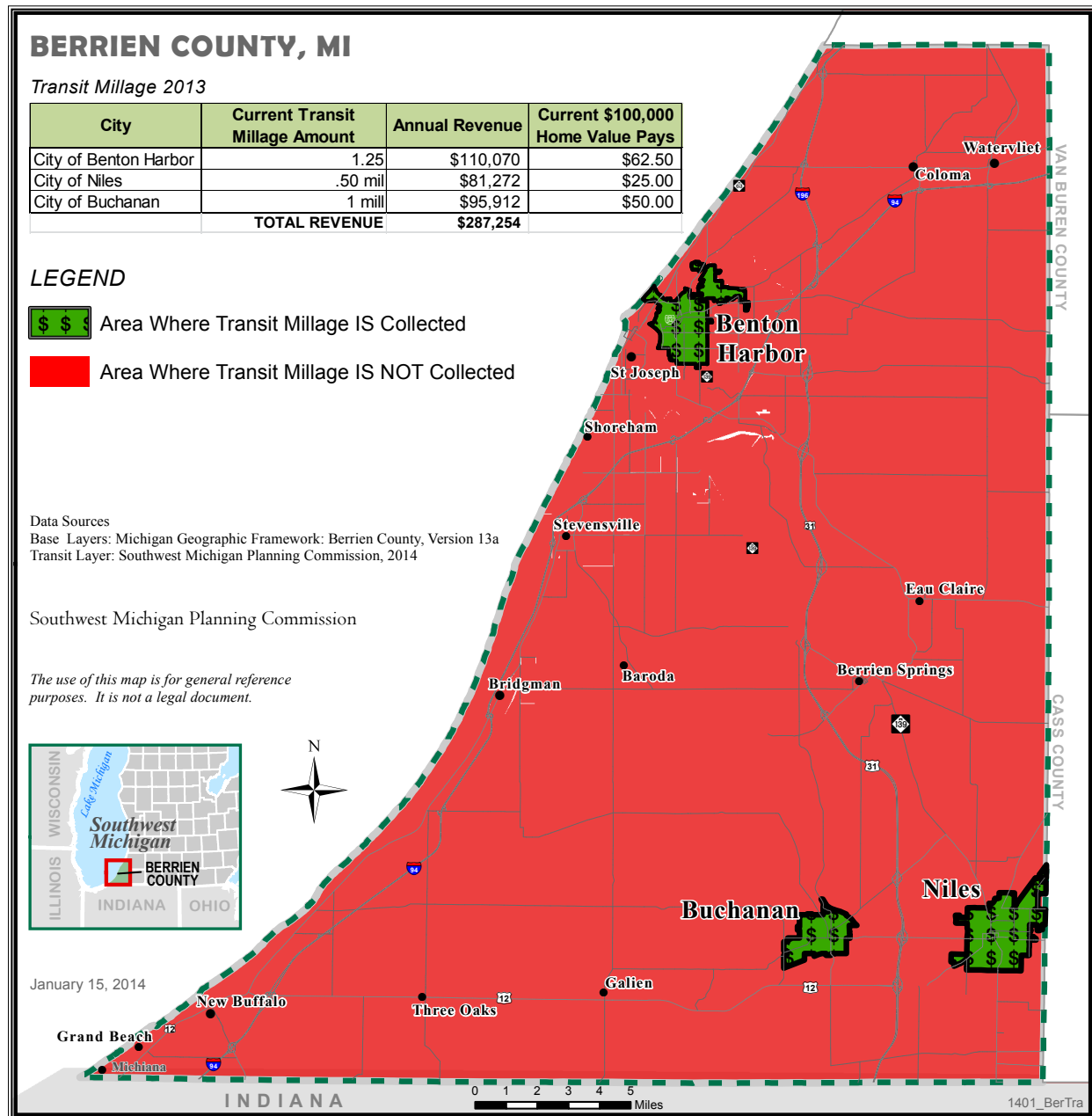
The creation of the BCTA would initiate a variety of issues and opportunities in regard to a millage. These include:

- As noted in Chapter 2, the BCTA would have the ability to levy a millage with the approval of a majority of the registered electors residing in the portion of the County served by the authority through a general or special election. The additional funds obtained through a possible millage could be used to expand services.

¹ According to TCATA the millage for the City of Benton Harbor was renewed in 2008 for twenty years. According to the City of Niles its millage will be up for renewal in August 2014.

² The millage to support senior centers is set at \$.30 for each \$1,000 of taxable valuation.

Figure 5-2: Berrien County Millages



- While many other communities in Michigan have been successful in passing a millage to support local transit services, the BCTA would need to champion an organized campaign to ensure a positive result. This would include providing the public specific information on the revenue amount that would be generated and details on service improvements.
- During this possible millage campaign some residents may be confused on what services will be funded and why it isn't a countywide millage. If the three jurisdictions that currently have a millage agree, a countywide millage could be considered. In this arrangement countywide revenues would initially be dispersed through an agreed upon allocation method. This arrangement would also provide the foundation for all systems in Berrien County to become part of one countywide authority.

While a countywide millage provides advantages for the other jurisdictions (i.e. their millage rate may go down since the overall property rate would increase), it would require consensus between the

multiple jurisdictions, agreement on the new millage, and repeal of the current local millages.

- There would be administrative costs related to the process in arranging for a countywide millage vote, advocating for support for the millage, and if successful, transitioning from the local millage system to the countywide one.

Countywide Millage Opportunities

While there are a variety of factors related to a countywide millage, there is also great opportunity to expand funding to support transit services in Berrien County. SWMPC worked with the Berrien County Equalization Department to determine the potential revenue from a countywide millage at a .25 rate. Based on the FY2013 taxable value in the County, Table 5-1 shows the increase in revenues that is possible through this countywide millage (even though the rate is substantially lower in the areas of the County that currently have a millage in place). It should be noted that future taxable values may be less.

Table 5-1: Projected Revenues from Countywide Millage

Transit System	Jurisdiction	Current Millage Rate	Total Millage Revenues FY 2013 (1)
TCATA	Benton Harbor	1.25	\$110,070
Buchanan Dial-a-Ride	City of Buchanan	1	\$81,272
Niles Dial-a-Ride	City of Niles	0.5	\$95,912
		Total	\$287,254

Possible Millage Rate	Projected Millage Revenue (2)	Increase Over FY 2013
0.25	\$1,753,726	\$1,466,472

(1) Source: Individual transit systems.

(2) Source: Berrien County Equalization Department based on 2013 Equalization Report.

OTHER POSSIBLE REVENUE SOURCES

Lake Michigan College is currently looking to improve reliable public transportation for students who reside in the City of Benton Harbor. The college has indicated that it may be willing to financially support public transit if services could be designed to better meet student needs. While these discussions are in the preliminary phase, they point out an advantage of a countywide system; Lake Michigan College could work with one organization/contact on a funding agreement. In addition, like many other funding issues there is a direct correlation with service planning since the College would want to ensure that it receives sufficient services for its contributions.

MISCELLANEOUS REVENUES

While the primary revenue sources to support public transit services in Berrien County are through federal, state, and local funds, the four transit providers currently report a variety of other revenues such as advertising, interest income, and gains from capital assets. For projecting a revenue plan for a countywide system, a similar amount was used to the miscellaneous revenues reported by the providers in FY2013.

REVENUE AMOUNTS

Tables 5-2 and 5-3 provide an overview of funding sources for FY2012 and FY2013. Figure 5-3 then provides a visual breakdown of the funding in FY2013, showing that about 68 percent of funding was through federal and state sources. In FY2013 about seven percent of funding for transit services was through the three local millages.

In addition to these funding programs, a variety of other sources are used by the four transit systems in Berrien County. This information is detailed in Tables 5-4 through 5-9.

Table 5-2: FY 2012 Revenues

System	Federal	State	Millage	Other Local	Farebox	Contract	Other	Total
TCATA	\$1,034,628	\$727,572	\$148,986	\$0	\$290,417	\$51,001	\$8,395	\$2,260,999
Buchanan Dial-a-Ride	\$29,833	\$76,315	\$85,907	\$0	\$12,637	\$0	\$4,616	\$209,308
Berrien Bus	\$180,858	\$424,200	\$0	\$78,152	\$98,185	\$280,249	\$14,377	\$1,076,021
Niles Dial-a-Ride	\$147,181	\$157,865	\$84,993	\$0	\$60,336	\$0	\$7,376	\$457,751
Total	\$1,392,500	\$1,385,952	\$319,886	\$78,152	\$461,575	\$331,250	\$34,764	\$4,004,079
Source: MDOT PTMS Revenue Schedule Report.								

Table 5-3: FY 2013 Revenues

System	Federal	State	Millage	Other Local	Farebox	Contract	Other	Total
TCATA	\$1,075,614	\$688,162	\$110,070	\$0	\$324,186	\$25,678	\$27,881	\$2,251,591
Buchanan Dial-a-Ride	\$26,329	\$74,438	\$85,000	\$0	\$12,134	\$0	\$2,944	\$200,845
Berrien Bus	\$158,311	\$374,832	\$0	\$170,309	\$85,799	\$272,344	\$9,290	\$1,070,885
Niles Dial-a-Ride	\$218,797	\$133,499	\$87,680	\$0	\$59,925	\$0	\$23,401	\$523,302
Total	\$1,479,051	\$1,270,931	\$282,750	\$170,309	\$482,044	\$298,022	\$63,516	\$4,046,623
Source: Tables 5-4 through 5-9 with revenues from individual systems.								

Figure 5-3: FY 2013 Revenues

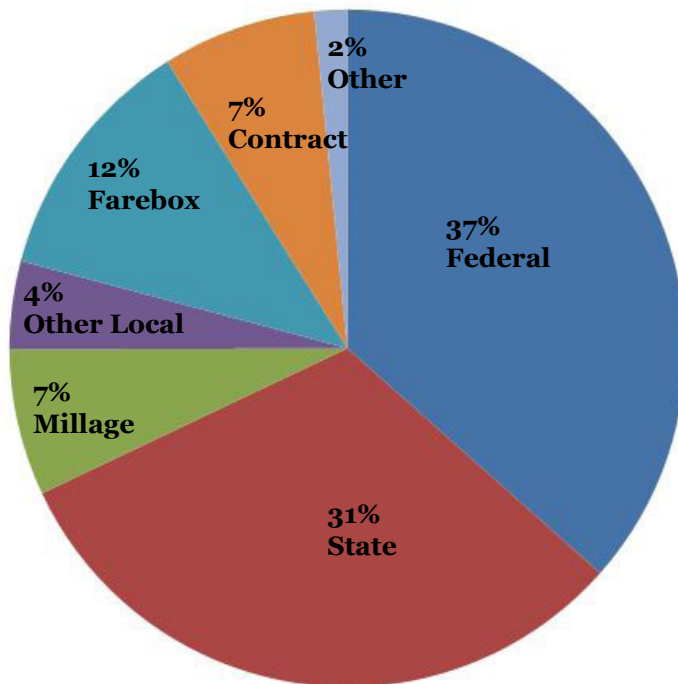


Table 5-4: TCATA FY 2013 Small Urban Service Revenues

Source		Amount
Farebox Revenue:	Passenger Fares	\$293,421
	Contract Fares	\$25,678
	Total Farebox Recovery	\$319,099
Auxiliary Transportation Revenues:	Concessions	\$3,235
	Advertising	\$1,200
	Total Auxiliary Transportation Revenues	\$4,435
Non-Transportation Revenues:	Refunds	\$23,152
	Total Non-Transportation Revenues	\$23,152
Local Revenue:	Millage	\$110,070
	Total Local Revenue	\$110,070
State Formula and Contracts:	State Operating Assistance	\$688,162
	Total State Formula and Contracts	\$688,162
Federal Contracts:	Section 5307 Operating	\$714,199
	Total Federal Contracts	\$714,199
Other Revenues:	Interest Income	\$294
	Total Other Revenues	\$294
Total Revenues		\$1,859,411
Source: MDOT PTMS Revenue Schedule Report.		

Table 5-5: TCATA FY 2013 Job Access Service Revenues

Source		Amount
Farebox Revenue:	Passenger Fares	\$30,765
	Total Farebox Recovery	\$30,765
Federal Contracts:	JARC	\$361,415
	Total Federal Contracts	\$361,415
Total Revenues		\$392,180
Source: MDOT PTMS Revenue Schedule Report.		

Table 5-6: Berrien Bus FY 2013 Revenues

Source		Amount
Farebox Revenue:	Passenger Fares	\$85,799
	Contract Fares	\$272,344
	Total Farebox Recovery	\$358,143
Non-Transportation Revenues:	Gains from Sales of Capital Assets	\$9,290
	Total Non-Transportation Revenues	\$9,290
Local Revenue:	Other Local Contracts (Buchanan Dial-A-Ride)	\$170,309
	Total Local Revenue	\$170,309
State Formula and Contracts:	State Operating Assistance	\$374,832
	Total State Formula and Contracts	\$374,832
Federal Contracts:	Section 5311 Operating	\$154,540
	RTAP	\$3,771
	Total Federal Contracts	\$158,311
Total Revenues		\$1,070,885
Source: MDOT PTMS Revenue Schedule Report.		

Table 5-7: Niles Dial-A-Ride FY 2013 Revenues

Source		Amount
Farebox Revenue:	Passenger Fares	\$59,925
	Total Farebox Recovery	\$59,925
Non-Transportation Revenues:	Gains from Sales of Capital Assets	\$7,102
	Total Non-Transportation Revenues	\$7,102
Local Revenue:	Millage	\$87,680
	Total Local Revenue	\$87,680
State Formula and Contracts:	State Operating Assistance	\$106,644
	Preventative Maintenance - State Share	\$25,447
	Other	\$1,408
	Total State Formula and Contracts	\$133,499
Federal Contracts:	Section 5307 - Operating	\$108,572
	Preventative Maintenance - Federal Share	\$101,782
	Other	\$8,443

Source		Amount
	Total Federal Contracts	\$218,797
Other Revenues	Interest Income	\$50
	Refunds and Credits	\$16,249
	Total Other Revenues	\$16,299
Total Revenues		\$523,302
Source: MDOT PTMS Revenue Schedule Report		

Table 5-8: Buchanan Dial-A-Ride FY 2013 Small Urban Service Revenues

Source		Amount
Farebox Revenue:	Passenger Fares	\$2,585
	Total Farebox Recovery	\$2,585
Local Revenue:	Millage	\$18,105
	Total Local Revenue	\$18,105
State Formula and Contracts:	State Operating Assistance	\$15,855
	Total State Formula and Contracts	\$15,855
Federal Contracts:	RTAP	\$585
	Total Federal Contracts	\$585
Other Revenues:	Interest Income	\$151
	Refunds and Credits	\$476
	Total Other Revenues	\$627
Total Revenues		\$37,757
Source: MDOT PTMS Revenue Schedule Report		

Table 5-9: Buchanan Dial-A-Ride FY 2013 Nonurban Service Revenues

Source		Amount
Farebox Revenue:	Passenger Fares	\$9,549
	Total Farebox Recovery	\$9,549
Local Revenue:	Millage	\$66,895
	Total Local Revenue	\$66,895
State Formula and Contracts:	State Operating Assistance	\$58,583
	Total State Formula and Contracts	\$58,583
Federal Contracts:	Section 5311	\$23,584
	RTAP	\$2,160
	Total Federal Contracts	\$25,744
Other Revenues:	Interest Income	\$558
	Refunds and Credits	\$1,759
	Total Other Revenues	\$2,317
Total Revenues		\$163,088
Source: MDOT PTMS Revenue Schedule Report		

COUNTYWIDE SYSTEM - CONCEPTUAL BUDGET

While a host of variables would impact a possible countywide transit system, Table 5-10 provides a conceptual operating budget for providing services through one entity. The conceptual budget can be used as a starting point for projecting revenues to support a countywide system and to balance this budget. For comparison the conceptual budget for a countywide system is presented against a cumulative FY2014 budget for the four transit systems.

The conceptual budget takes into the following assumptions:

- The proposed staffing plan for a countywide system discussed in Chapter 3 was used to project salaries and fringe benefits for both administrative and operational positions. Some current positions have administrative responsibilities but are reported to MDOT as part of operations expenses. Therefore, when reviewing the conceptual budget it is imperative that it be viewed from a potential bottom line and not simply by line item or category.
- Wages for both administrative and operations were mainly determined using an interactive computer tool that accompanies *TCRP Report #127: Employee Compensation Guidelines for Transit Providers in Rural and Small Urban Areas*. These compensation levels are estimates only and are used for illustrative purposes. Actual compensation levels will be determined based on existing wages, this TCRP report, and the type of organization selected. The primary source of data for this tool was a survey of rural and small urban area operators across the country. The tool then provides the ability to obtain wage information from comparable transit systems based on basic characteristics of the system, service area, and operating environment. To obtain appropriate wage scales for a possible countywide transit system in Berrien County, the following inputs were used: State: Michigan, Area: Includes urbanized area, Total Employees: > 50, Union: Yes.

Appendix K provides additional information on the outputs from using the interactive tool that were used to project possible wage levels. Some wage levels were adjusted based on the study team's knowledge of similar positions relative to Berrien County.

- For a countywide program through one organization, the conceptual budget includes the following assumptions regarding expenses:
 - Providing transit through one countywide system will result in a three fourths reduction in the following administrative expenses due to responsibilities being handled by one office as opposed to four entities: advertising fees, audit costs, other services, materials and supplies, and association dues and subscriptions.
 - "Travel, Meetings, and Training" will be reduced by half with the management of transit services through one entity.
 - Providing transit through one countywide system will result in a 10% reduction in the following operating expenses due to economies of scale, coordinated service planning, and management of operations through one administrative office: fuels and lubricants, tires and tubes, materials and supplies/major purchases, and other services.
 - Utilities will be reduced by one third with the operations of services through two facilities instead of three (discussed further in Chapter 6).

Taking into account these variables and assumptions, the conceptual budget for a countywide system shows the potential for providing current service levels at an approximately \$216,916 lower overall budget than the four transit systems combined in FY2014. Much of the savings would be through the reduction in duplicative management and administrative positions and expenses, economies of scale, and the reduction of facilities from three to two. Again, it should be stressed that there are a variety of assumptions involved in this budget.

Table 5-10: Countywide Transit System Conceptual Budget

Expenses	FY 2014 Current Four Systems	Projected (1)
System Administration:		
Administrative Salaries and Fringe		
Transit Director		\$72,463
Administrative Assistant		\$34,095
Planning/Marketing Manager		\$47,719
Finance Clerk/Bookkeeper		\$36,391
Safety and Training Manager		\$42,460
Mobility Manager		\$45,000
Estimated Fringe (36%)		\$100,126
Subtotal, Administrative Salaries and Wages (2)	\$620,124	\$378,254
Advertising Fees	\$5,841	\$1,460
Audit Costs	\$24,763	\$6,191
Other Services (3)	\$156,208	\$39,052
Taxes and Fees	\$229	\$250
Travel, Meetings, and Training	\$28,161	\$14,081
Association Dues and Subscriptions	\$10,387	\$3,462
Other Misc. Expenses	\$25,595	\$26,000
Subtotal, Non-Personnel Administrative Costs	\$251,184	\$90,496
Total Administration	\$871,308	\$468,750
System Operation:		
Operating Salaries and Fringe		
Operations Supervisor		\$46,904
Administrative/Clerical Support		\$27,394
Street Supervisor		\$36,109
Dispatcher/Schedulers - 4		\$123,469
Fleet Maintenance Manager		\$47,861
Maintenance Clerk		\$31,554
Mechanic		\$37,565
Mechanic Assistant		\$28,829
Maintenance Utility Worker		\$27,331
Full Time Drivers (4)		\$1,009,736
Part Time Drivers		\$283,400
Estimated Fringe (5)		\$510,030
Subtotal, Operations Personnel (6)	\$1,927,332	\$2,210,181
Fuels and Lubricants	\$541,021	\$486,919
Tires and Tubes	\$32,252	\$29,027
Other Materials and Supplies	\$105,714	\$95,143
Preventative Maintenance	\$129,574	\$130,000
Utilities	\$94,714	\$62,511
Liability Insurance	\$110,549	\$110,000
Other Insurance	\$14,436	\$15,000
Training	\$8,000	\$8,000
Operating Leases and Rentals	\$12,915	\$13,500

Expenses	FY 2014 Current Four Systems	Projected (1)
Other Services (7)	\$228,131	\$230,000
Subtotal, Operational Expenses	\$1,277,306	\$1,180,100
Total Operating Expenses	\$4,075,946	\$3,859,030
Projected Difference From Current		-\$216,916
(1) Wages based on average wage provided by TCRP Report 127 tool. (2) Total "Other Salaries and Wages" in FY2014 Expense Schedule Reports. (3) Major expense is for Berrien Bus (\$23,649 TMI allocation, \$104,000 for Berrien County administration, Dial-A-Ride On-line, building, and bus service). (4) Assumes 35 full time and 25 part time (20 hours per week) drivers. (5) Assumes benefits for all full-time positions. (6) Total "Operators Salaries and Wages/Dispatcher Salaries and Fringe Benefits" in FY2014 Expenses Schedule Requests. (7) Security, janitorial, sanitation, bus repair for TCATA in FY2014 Expense Schedule Reports.		

COUNTYWIDE SYSTEM - PROJECTED REVENUES

Taking into account a variety of factors and uncertainties, Table 5-11 provides a projected operating revenue plan for a countywide transit system. As noted in the review of revenue sources, it is anticipated that some potential funding sources would be available to support a countywide transit system, but due to current conditions no amount was proposed. The revenue projection includes approximately \$485,165 in local funds, due to a reduction in federal funds through the elimination of JARC. However, this difference could be offset by the additional local funding available through a countywide millage, or through several additional sources, i.e. JARC-related funding through Section 5307/5311 or New Freedom-related funding through Section 5310.

Table 5-11: Countywide Transit System Projected Operating Revenues

Proposed Total Direct Operating Expenses	\$3,859,030
Farebox:	
Fares (1)	\$459,225
Net Deficit	\$3,399,805
Federal Programs:	
Urbanized Area Formula - S. 5307 for Benton Harbor-St. Joseph (2)	\$952,931
Urbanized Area Formula - Portion of S. 5307 for South Bend, IN (3)	\$110,000
Non-Urbanized Area Formula - S. 5311 (3)	\$178,124
Enhanced Mobility of Seniors and Individuals with Disabilities - S. 5310 (4)	\$-
State Programs:	
Local Bus Operating Assistance Program (5)	\$1,308,585
Specialized Services Program (6)	\$-
Local:	
Projected Countywide Millage (7)	\$485,165
Human Service Contract Revenue (8)	\$300,000
Other:	
Miscellaneous (9)	\$65,000
Proposed Total Operating Revenues	\$3,399,805
<p>(1) Based on FY2013 average farebox recovery of 11.9% for public transit trips. (2) Based on FTA FY2014 projected apportionments. (3) Based on FY2013 amounts. (4) No revenues projected, however beginning in Federal FY2013 funds may be used for operating expenses. (5) Based on projected eligible expenses x current MDOT reimbursement percentage (38.49%). (6) No revenues projected, however County can consider applying to MDOT in future. (7) Based on amount needed to balance budget after accounting for all other revenues. Note: FY2013 Total Local Millage Amounts = \$282,750 (TCATA = \$1110,070, Buchanan = \$85,000, Niles = \$87,680). (8) Assumes similar amount to contract revenues in FY2013. (9) Assumes similar amount to other revenue sources reported by individual systems for FY2013.</p>	

PROJECTED REVENUES - CORRELATION TO SERVICE

When assessing potential revenues for a countywide system, there is a critical correlation with service levels and design. A variety of issues need to be considered, including:

- Section 5307 funds must be used in the specific urbanized area from which they are appropriated.
- Section 5311 funds must be used in rural areas of the County.
- If separate millages continue to be in place, communities will want assurance that they are receiving appropriate levels of service. If a countywide millage is enacted, communities throughout the County will want to feel that their constituents are receiving appropriate levels of service.
- Human service agencies currently contracting for transportation services will want assurance that the needs of their clients will continue to be served through the funds they are paying.
- These issues can be addressed through a cost allocation formula based on vehicle service hours and miles. This formula helps to allocate local share costs and to assure local stakeholders that the various revenues supporting transit services in the County are allocated in an equitable manner.

CONCEPTUAL FINANCIAL PLAN

This section offers a broader vision for transit services in Berrien County by providing a conceptual financial plan for operating existing and proposed transit services on a countywide basis over a five-year planning period. This Financial Plan uses the conceptual budget along with the overall FY2013 service hours to determine a cost per hour of \$47.65 to project operating expenses. It also assumes that implementation of the Berrien Bus shuttles and the expanded fixed route services in the TCATA service area would occur in Year One since both impact existing demand-response and dial-a-ride services. If these expansions occurred in later years, the Berrien County demand-response service hours and Benton Harbor Dial-A-Ride services hours should be appropriately modified.

Table 5-12 shows that the annual operating expenses for a countywide system are projected to grow from about \$3.8 million to over \$5 million during the five year period. This figure accounts for inflation and the service improvements discussed in Chapter 4. The local amount needed through a millage would increase to about \$903,469 over the five year time frame. However, this amount is still much less than the projected revenue through a countywide millage. It also allows for consideration of other service expansions and improvements.

Table 5-12: Conceptual Financial Plan for Operations of Countywide Transit Services

Projected Services (1)	Year 1	Year 2	Year 3	Year 4	Year 5
Maintained/Modified Existing Services	42,821	42,821	42,821	42,821	42,821
Modified/New Services					
Expanded Fixed Route Service in Current TCATA Service Area (2)	18,304	18,304	18,304	18,304	18,304
Benton Harbor/St. Joseph - Berrien Springs - Niles Shuttle	2,080	2,080	2,080	2,080	2,080
Watervliet/Coloma - Benton Harbor/St. Joseph Shuttle	1,560	1,560	1,560	1,560	1,560
Benton Harbor/St. Joseph - Bridgman - Sawyer - New Buffalo Shuttle	1,560	1,560	1,560	1,560	1,560
Berrien County Demand Response Service	16,745	16,745	16,745	16,745	16,745
Niles Dial-A-Ride Expansion		179	179	179	179
Berrien Springs Dial-A-Ride Service			2,600	2,600	2,600
Expanded Frequency on Niles Route 2 Service			3,328	3,328	3,328
Watervliet - Coloma Dial-A-Ride Service					2,600
Expanded Hours for Niles Route 2 Service					1,508
Total Transit Service Hours	83,070	83,249	89,177	89,177	93,285
Projected Operating Expenses (2)					
Cost Per Revenue Hour	\$47.65	\$49.08	\$50.55	\$52.07	\$53.63
Maintained/Modified Existing Services	\$2,040,421	\$2,101,633	\$2,164,682	\$2,229,623	\$2,296,511
Expanded Fixed Route Service in Current TCATA Service Area	\$872,186	\$898,351	\$925,302	\$953,061	\$981,653
Benton Harbor/St. Joseph - Berrien Springs - Niles Shuttle	\$99,112	\$102,085	\$105,148	\$108,302	\$111,551
Watervliet/Coloma - Benton Harbor/St. Joseph Shuttle	\$74,334	\$76,564	\$78,861	\$81,227	\$83,664
Benton Harbor/St. Joseph - Bridgman - Sawyer - New Buffalo Shuttle	\$74,334	\$76,564	\$78,861	\$81,227	\$83,664
Berrien County Demand Response Service	\$797,899	\$821,836	\$846,491	\$871,886	\$898,043
Niles Dial-A-Ride Expansion		\$8,785	\$9,049	\$9,320	\$9,600
Berrien Springs Dial-A-Ride Service			\$131,435	\$135,378	\$139,439
Expanded Frequency on Niles Route 2 Service			\$168,237	\$173,284	\$178,482
Watervliet - Coloma Dial-A-Ride Service					\$139,439
Expanded Hours for Niles Route 2 Service					\$80,875
Total Projected Operating Expenses	\$3,958,286	\$4,085,819	\$4,508,065	\$4,643,307	\$5,002,921
(1) Implementation years are estimated. Implementation will be based on status of countywide transit efforts and funding availability. (2) Year 1 Cost per Hour based on average of four current providers. Years 2-5 assume 3% rate of inflation each year.					

Table 5-12: Conceptual Financial Plan for Operations of Countywide Transit Services (continued)

Anticipated Major Funding Sources	Year 1	Year 2	Year 3	Year 4	Year 5
Federal Section 5307	\$1,062,931	\$1,094,819	\$1,127,663	\$1,161,493	\$1,196,338
Federal Section 5311	\$178,124	\$183,468	\$188,972	\$194,641	\$200,480
Subtotal, Federal	\$1,241,055	\$1,278,287	\$1,316,635	\$1,356,134	\$1,396,818
State Operating Assistance	\$1,342,242	\$1,385,489	\$1,528,671	\$1,574,531	\$1,696,475
Subtotal, State	\$1,342,242	\$1,385,489	\$1,528,671	\$1,574,531	\$1,696,475
Local Millage	\$538,952	\$559,881	\$739,071	\$761,243	\$903,469
Local Contract Revenue	\$300,000	\$309,000	\$318,270	\$327,818	\$337,653
Local Farebox Revenues (3)	\$471,036	\$486,212	\$536,460	\$552,554	\$595,348
Local Other	\$65,000	\$66,950	\$68,959	\$71,027	\$73,158
Total Local	\$1,374,988	\$1,422,044	\$1,662,759	\$1,712,642	\$1,909,627
Total Projected Operating Revenues	\$3,958,286	\$4,085,819	\$4,508,065	\$4,643,307	\$5,002,921
(3) Based on average farebox recovery percentage of 11.9%.					

Chapter 6

CAPITAL CONSIDERATIONS/ CAPITAL IMPROVEMENT PLAN

This chapter provides a review of the capital assets of the four transit systems, including a vehicle inventory. It then discusses capital considerations relevant for countywide transit services. This chapter concludes with a proposed Capital Plan to support the expanded transit services presented in Chapter 4.

VEHICLE INVENTORY

This section provides a review of the current vehicle fleet for the four transit providers.

TCATA

As of December 1, 2013, TCATA operates a total of 25 transit service vehicles. All vehicles except for one van are high floor cut-away buses, and all but two of the vehicles in the fleet are wheelchair lift-equipped. As of December 1, 2013, eight vehicles in the TCATA fleet had reached their useful life standard as established by MDOT of 150,000 miles, and another five had between 100,000 and 150,000 miles. The non-revenue portion of the TCATA fleet includes a 2001 Ford heavy duty wrecker that is used as a tow truck, along with three automobiles that are used as supervisor support vehicles.

Berrien Bus

As of November 30, 2013, Berrien Bus operates transit services with a fleet of 22 vehicles. The fleet is a mix of small and medium wheelchair-equipped high floor cut-away buses, along with one light duty van. As of November 30, 2013, one vehicle in the fleet had reached its useful life by MDOT criteria. The Berrien Bus fleet also includes a 2011 GMC heavy duty pickup truck used by TMI as a support and maintenance vehicle.

Buchanan Dial-A-Ride

As of December 2013, the Buchanan Dial-A-Ride fleet consists of three cut-away buses, each equipped with wheelchair lift.

Niles Dial-A-Ride

As of December 23, 2013, the Niles Dial-A-Ride fleet operates six cut-away buses, all of which are equipped with a wheelchair lift. As of December 23, 2013 two of these vehicles had reached the MDOT useful life criteria, and another three vehicles had over 100,000 miles. Niles Dial-A-Ride also has a service truck as part of its fleet.

Table 6-1 provides an overall inventory of vehicles used in operation in Berrien County as of the dates noted. This inventory does not include vehicles that are currently on order. Table 6-2 then provides

additional details on the vehicle fleet characteristics. Table 6-3 contains information on the support vehicles used by the four transit systems. Table 6-4 provides additional information on the radio communication equipment used by each transit system.

Some highlights from this collective review include:

- There are 56 vehicles available for countywide services if the overall fleet was under one entity.
- All but two vehicles are equipped with a wheelchair lift.
- The majority of the vehicles in the overall County fleet are small to medium buses, with seating capacity between eight and nineteen.
- Eleven vehicles have reached their useful life per MDOT criteria. In particular the Niles Dial-A-Ride and TCATA services are provided through an older vehicle fleet.
- As noted in Chapter 4, it is unusual in the United States for a transit system serving a small urban area like TCATA to have such a limited fixed route schedule. As a result TCATA utilizes a high percentage of its vehicle fleet for demand response/dial-a-ride services.
- Of the 58 vehicles operating in Berrien County, only six of the vehicles are equipped with bike racks (less than 11 percent). In 2012 the American Public Transportation Association (APTA) reported that 74 percent of buses nationally are equipped with exterior bike racks.
- According to APTA, nationally 55 percent of buses are equipped with security or CCTV type cameras, compared to 36 percent of the Berrien County combined fleet.
- The providers are using a variety of radio communication equipment that will need to be considered as part of future consolidation efforts and as part of capital funding applications.

Table 6-1: Vehicle Inventory for Berrien County

Transit System	Local ID	Type	Equipped with Lift or Ramp?	Seating Capacity	Wheelchair Capacity	Mileage*	Year
TCATA	5	Van	N	15	0	47,968	1998
TCATA	6	Small Cutaway	Y	17	2	178,043	2007
TCATA	7	Small Cutaway	Y	16	2	8,672	2010
TCATA	8	Small Cutaway	Y	16	2	111,958	2010
TCATA	9	Small Cutaway	Y	13	2	166,768	2013
TCATA	10	Small Cutaway	Y	17	2	166,948	2007
TCATA	11	Small Cutaway	N	19	0	108,072	2007
TCATA	12	Small Cutaway	Y	13	2	3,195	2013
TCATA	14	Small Cutaway	Y	16	2	88,131	2010
TCATA	15	Small Cutaway	Y	13	2	12,225	2013
TCATA	16	Small Cutaway	N	19	0	10,410	2013
TCATA	17	Small Cutaway	Y	16	2	92,682	2010
TCATA	18	Small Cutaway	Y	16	2	140,663	2010
TCATA	19	Small Cutaway	Y	16	2	87,026	2010
TCATA	20	Small Cutaway	Y	13	2	92,088	2010
TCATA	21	Small Cutaway	Y	17	2	150,535	2007
TCATA	22	Small Cutaway	Y	13	2	14,114	2013
TCATA	23	Small Cutaway	Y	16	2	145,456	2007

Transit System	Local ID	Type	Equipped with Lift or Ramp?	Seating Capacity	Wheelchair Capacity	Mileage*	Year
TCATA	24	Small Cutaway	Y	16	2	113,393	2010
TCATA	25	Small Cutaway	Y	16	2	106,140	2010
TCATA	26	Small Cutaway	Y	16	2	152,300	2010
TCATA	27	Small Cutaway	Y	17	2	157,382	2007
TCATA	28	Small Cutaway	Y	13	2	8,765	2013
TCATA	29	Small Cutaway	Y	16	2	190,291	2010
TCATA	30	Small Cutaway	Y	16	2	191,690	2010
Niles	4	Light Duty Cutaway	Y	18	2	12,818	2013
Niles	2	Light Duty Cutaway	Y	16	2	104,615	2010
Niles	3	Light Duty Cutaway	Y	10	2	102,207	2010
Niles	2	Light Duty Cutaway	Y	10	2	195,212	2004
Niles	1	Light Duty Cutaway	Y	12	6	127,536	2008
Niles	7	Light Duty Cutaway	Y	10	2	215,149	2005
Berrien Bus	54	Med Cutaway	Y	18	2	1,026	2014
Berrien Bus	41	Small Cutaway	Y	8	2	87,560	2009
Berrien Bus	37	Small Cutaway	Y	8	2	74,629	2009
Berrien Bus	38	Small Cutaway	Y	8	2	88,129	2009
Berrien Bus	39	Small Cutaway	Y	8	2	90,024	2009
Berrien Bus	40	Small Cutaway	Y	8	2	93,932	2009
Berrien Bus	53	Small Cutaway	Y	10	2	21,046	2013
Berrien Bus	52	Small Cutaway	Y	10	2	44,779	2012
Berrien Bus	32	Med Cutaway	Y	18	2	127,890	2006
Berrien Bus	26	Med Cutaway	Y	18	2	173,116	2006
Berrien Bus	31	Med Cutaway	Y	18	2	161,749	2006
Berrien Bus	25	Med Cutaway	Y	12	4	201,710	2005
Berrien Bus	33	Med Cutaway	Y	18	2	113,437	2007
Berrien Bus	44	Med Cutaway	Y	14	2	67,864	2010
Berrien Bus	42	Med Cutaway	Y	12	2	92,392	2010
Berrien Bus	45	Med Cutaway	Y	14	2	87,833	2010
Berrien Bus	43	Med Cutaway	Y	18	2	80,696	2010
Berrien Bus	46	Med Cutaway	Y	18	2	68,260	2010
Berrien Bus	51	Light Duty Van	Y	5	2	19,231	2011
Berrien Bus	50	Med Cutaway	Y	12	4	36,353	2011
Berrien Bus	47	Med Cutaway	Y	18	2	62,805	2011
Berrien Bus	48	Med Cutaway	Y	18	2	57,794	2011
Buchanan	6	Light Duty Cutaway	Y	10	1	51,519	2008
Buchanan	4	Light Duty Cutaway	Y	10	1	97,271	2008
Buchanan	5	Light Duty Cutaway	Y	10	1	104,521	2008
* Mileage for TCATA as of 12/01/13, Niles as of 12/23/13, Berrien Bus as of 11/30/13, and Buchanan as of 1/15/14.							
Source: Individual transit systems.							

Table 6- 2: Vehicle Fleet Characteristics

	TCATA	Niles Dial-A-Ride	Berrien Bus	Buchanan Dial-A-Ride
Total Number of Revenue Vehicles	25	6	22	3
Seating Capacity:				
8 Passengers	0	0	5	0
10 Passengers	0	3	2	3
12 Passengers	0	1	3	0
13 Passengers	6	0	0	0
14 Passengers	0	0	2	0
15 Passengers	1	0	0	0
16 Passengers	12	1	0	0
17 Passengers	4	1	0	0
18 Passengers	0	0	9	0
19 Passengers	2	0	0	0
Others	0	0	1	0
Equipped with Wheelchair Lift	All but three	All	All	All
Percent of total fleet used for fixed or flex route services (1)	12%	16%	0%	0%
Percent of total fleet used for demand response service (2)	88%	84%	100%	100%
Vehicle Ownership	TCATA	City of Niles	Berrien County	City of Buchanan
Average Age of Vehicles	2010	2008	2009	2008
Vehicles Beyond 100,000 Miles	13	5	5	0
Vehicles Beyond MDOT Useful Life Criteria	5	2	1	0
Fare Box Technology	None	None	None	None
Security or CCTV Type Cameras	Yes	No	No	No
Automatic Vehicle Location or GPS	No	No	No	No
Bike Racks	3	6	None	None
(1) Fixed route/flex route services operate along a predetermined route on regular schedules.				
(2) Demand response service vehicles take passengers directly from their origins to their destinations.				
Source: Individual transit systems/SWMPC.				

Table 6- 3: Support Vehicles

Transit System	Type	Mileage*	Year
Berrien Bus	GMC Sierra pickup with plow	13,021	2011
Niles Dial-A-Ride	Ford F250 Service Truck	7,360	2008
TCATA	Ford Fusion	N/A	2010
TCATA	Ford Taurus	N/A	2010
TCATA	Buick Century	N/A	2003
TCATA	Ford Wrecker	N/A	2001
* Berrien Bus mileage reported on 11/30/13; Niles as of 12/23/13.			

Table 6-4: Radio Communication Equipment

	TCATA	Niles Dial-A-Ride	Berrien Bus/ Buchanan Dial-A-Ride
Radio Type		Kenwood Nex Edge	25 UHF mobile radios / 24 mobile radio antennas
Frequency		25 kHz.	900 mhz.
Ability to Communicate with Other Transit Agencies	No	Yes	No
Ability to Communicate with Emergency Services	No	Yes	No
Maintenance of Radios/ Towers	Contracted		

FACILITIES

Transit services in Berrien County are operated through three separate facilities:

- TCATA owns a transit facility that serves as an administrative office, vehicle storage, and maintenance facility. The facility also serves as a transfer point connecting to Berrien Bus. The maintenance facility is equipped primarily for preventive maintenance. Major repairs are conducted off site.
- Berrien Bus and Buchanan Dial-A-Ride are operated by TMI out of the same facility in Berrien Springs. The facility houses the TMI administrative offices, vehicle storage, maintenance, and a bus washing bay. The maintenance facility is equipped to address preventive maintenance and most major repairs. Berrien County owns the TMI transit facility, is responsible for all capital improvements, and allows TMI office space via a local agreement renewed annually.
- Berrien County is planning to move the operations facility from Berrien Springs to a location on Napier Avenue near I-94. In December 2013, Berrien Bus reported that this move is at least two years away.
- The Niles Dial-A-Ride facility was completed in 2010 and funded through the American Recovery and Reinvestment Act. The facility is owned by the City of Niles and includes vehicle storage, administrative offices, and maintenance. The maintenance facilities are adequate for addressing most major repairs. There are no plans to invest in any other facilities in the near future for Niles Dial-A-Ride.

Additional information on each facility is provided in Table 6-5. Table 6-6 provides information on the distance between the various facilities, including the potential new Berrien Bus location, to demonstrate possible deadhead (non-revenue miles). Figure 6-1 displays the locations of the current facilities and the distance between each site.

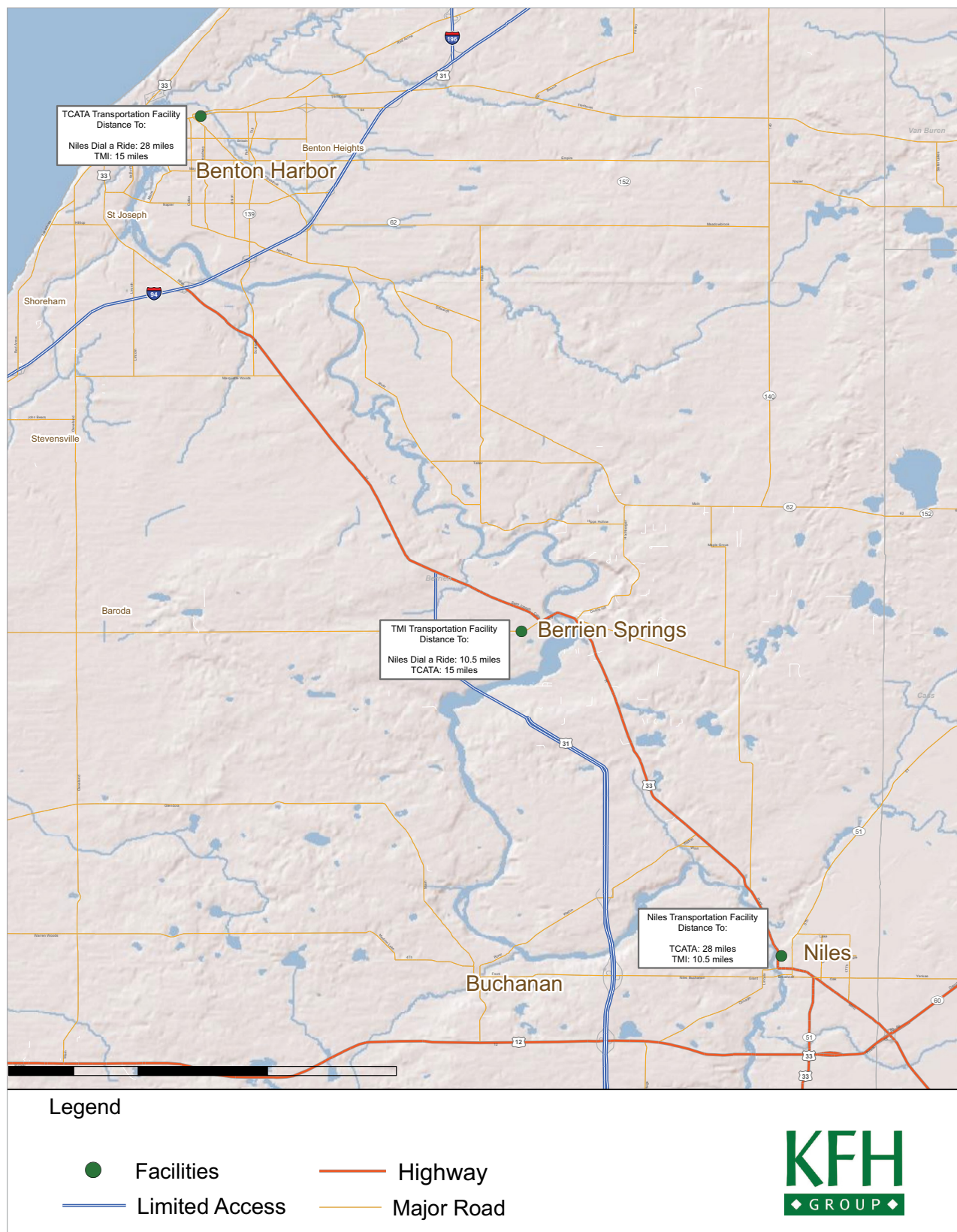
Table 6- 5: Facility Information

	TCATA	Niles Dial-A-Ride	Berrien Bus/ Buchanan Dial-A-Ride
Location	275 Wall Street, Benton Harbor	23 N. Second Street, Niles	676 E. Shawnee Road, Berrien Springs
Ownership	TCATA	City of Niles	Berrien County
Original Design/ Construction Date	Maintenance Facility, 1980	Existing building purchased by City in 1983, substantial renovation in 2009	October 1993
Book Value	\$1,631,341		
Monthly Lease	None	None	Leases to TMI for \$1 per year
Condition	Good	Good	Fair
Approximate Site Acreage	1.3 acres	1 acre	2 acres
Square Footage	Operations/Dispatch: 768 sq. ft. Administration: 4,192 sq. ft. Maintenance: 1,152 sq. ft. Vehicle Storage: 12,000 sq. ft.	Operation/Dispatch/Offices: 1,760 sq. ft. Maintenance: 2,400 sq. ft. Vehicle Storage: 9,120 sq. ft.	Operation/Dispatch/Offices: 1,040 sq. ft. Maintenance: 12,960 sq. ft. Transfer Center: 400 sq. ft.
Maintenance Bays	1	1	1
Fuel Tanks	Yes, upgraded in 1999	One, 8,000 gallon capacity installed in 1984	None
Features	Large customer waiting area for transfers	Customer waiting area, enclosed garage for bus storage that accommodates ten small buses	Customer waiting area
Bus Washer	Yes	Yes	Yes
Welding Shop	No	No	Yes
Tire Changer	Yes	Yes	Yes
Wheel Balancer	No	No	Yes
Other Equipment/ Notes	Major shop items include vehicle hoist, power washer, along with a variety of shop tools. Facility equipment includes a lawn tractor, snow thrower, edger, and floor washer. Building and grounds maintenance contracted out to area firms.	Snow blower, salt spreader, lawn mower, and some vehicle diagnostic equipment. Also have a variety of other small equipment and tools.	Shop Equipment: air compressor, drum/disc brake lathe, vehicle lift, arc welder, and shop press. Facility maintenance equipment: small snow blower, and lawn tractor.

Figure 6-6: Potential Deadhead Miles between Maintenance/Transportation Facilities

	TCATA	Berrien Bus	Niles Dial-A-Ride	Buchanan Dial-A-Ride
TCATA		15	28	25.8
Berrien Bus	15		10.5	12.5
Niles Dial-A-Ride	28	10.5		6.2
Buchanan Dial-A-Ride	25.8	12.5	6.2	
Future Berrien Bus Location	3		25	23

Figure 6-1: Current Facilities



OTHER CAPITAL RESOURCES

Each facility has a variety of other capital funded equipment. Maintenance tools, equipment, and fixtures owned by Berrien Bus would transition to the BCTA. Similar capital funded items at the other facilities that have not met their useful life would transition to the BCTA as part of any future consolidation and in consultation with MDOT staff. In addition, each facility has separate capital items such as computers, phone systems, and copiers. Many of these items have a shorter useful life than the maintenance equipment, so some may be beyond this timeframe before the implementation of the BCTA or any consolidation efforts. Therefore, this inventory will need to be updated and the current items appropriately transitioned to the BCTA in consultation with MDOT.

CAPITAL PROGRAM CONSIDERATIONS

Capital equipment includes maintenance equipment, vehicles, technology, facilities, and other equipment. Clearly there are many positive impacts to a countywide system related to capital equipment. Single procurement can eliminate administrative duplication and can help achieve economies of scale, i.e. unit costs will be lower for 20 units than four orders of five units.

Some other considerations include:

- A countywide fleet provides the opportunity for greater flexibility in the use of vehicles, a reduction in maintenance costs, and an improved spare ratio.
- There is an abundance of support vehicles including one wrecker, two pickup trucks, and three sedans. This is more than enough and will not need replacing for many years if maintained properly.
- In the area of technology, there are clear benefits to a countywide approach which would justify an investment in more advanced technology to improve system performance, safety, and record keeping. Fleets of five to ten vehicles cannot gain many advantages from the deployment of more technology, however fleets of 56 vehicles can successfully use this technology to reduce costs.
- While there are three major transit facilities in the County, one to two would be sufficient for operating transit services in a jurisdiction the size of Berrien County. The Niles Dial-A-Ride and TCATA facilities were paid for with transit grant funds, and are located at opposite ends of the County, so it seems logical that they would serve as facilities for a countywide system.

However, this arrangement is complicated by the planned phasing of countywide services, with the BCTA that assumes Berrien Bus serving as the foundation for a countywide system. The BCTA would need a facility, either the current location in Berrien Springs or the proposed location on Napier Avenue, to operate services until a consolidated effort with either Niles Dial-A-Ride and/or TCATA came to fruition. In addition, while the Niles and TCATA facilities could serve as appropriate operations centers they are not large enough to accommodate the Berrien Bus fleet.

Therefore, the facility issue will be one that will be addressed as any future consolidation efforts occur. Some possibilities include using the proposed BCTA facility for administration and operations, with the TCATA and Niles facilities used primarily as satellite locations for maintaining vehicles. With available capacity both could be used as revenue generators by providing vehicle maintenance for human service agencies in the County or through renting of office space.

CAPITAL FUNDING IMPLICATIONS

Similar to the current arrangements in the County, primary capital expenses for a countywide system would involve facility and vehicle replacement costs. Other capital costs would include computer hardware/software replacements or upgrades, bus stop signage or improvements, and communication equipment upgrades. A variety of sources would be used to offset these costs:

- Federal funds through the Section 5307, 5310, and 5311 programs
- State funds through MDOT's Local Bus Capital Program
- State funds through MDOT's Service Development and New Technology Program
- Local funds

CAPITAL IMPROVEMENT PLAN

The following section takes into account current conditions along with the Operations Plan for countywide transit services presented in Chapter 4 to provide a conceptual capital improvement plan. Some overall assumptions related to a five year capital improvement plan for the County include:

- Vehicles currently owned by Berrien Bus would be transferred to the BCTA when it is formed. The BCTA would serve as the applicant for future vehicle purchases.
- If other transit systems join the BCTA their vehicles would also transition to become part of the vehicle inventory, providing greater flexibility in the operation of services. The BCTA would also assume the role as the applicant for future vehicle acquisitions.
- In the short term individual applications to MDOT for technology upgrades would be coordinated between the four systems to ensure future compatibility. Ultimately through a countywide system the BCTA would serve as the applicant.

Vehicle Replacement and Expansion Program

Based on the current Transportation Improvement Programs (shown in Table 6-7), it is anticipated 14 vehicles will be replaced between FY2014 and FY2017.

Table 6-7: Replacement Vehicle Schedule

Transit System	Fiscal Year	Number of Vehicles	Model
Niles Dial-A-Ride	2014	1	Cutaway
Niles Dial-A-Ride	2015	1	Cutaway
Buchanan Dial-A-Ride	2015	2	Cutaway
TCATA	2016	2	Cutaway
Niles Dial-A-Ride	2017	1	Cutaway
TCATA	2017	3	Cutaway
Berrien Bus	2017	4	Small Bus (< 30')
Total Replacement Vehicles:		14	
Source: 2014-2017 NATS TIP for Niles and Buchanan.			
Source: 2014-2017 TwinCATS TIP for TCATA and Berrien Bus.			

Chapter 4 included several service expansions that would require ten additional vehicles (shown in Table 6-8). This proposed vehicle expansion schedule assumes that the proposed countywide demand response service and the Berrien Springs Dial-A-Ride service would be provided through the current fleet.

Table 6-8: Proposed Vehicle Expansion Schedule

Expansion Project	Projected Expansion Year	Number of Vehicles	Model	Seating Capacity/ Wheelchair Placements
Expanded Fixed Route Service in Current TCATA Service Area	1	3	Small Bus (< 30')	18/2
Benton Harbor/St. Joseph -Berrien Springs - Niles Shuttle	1	1	Small Bus (< 30')	18/2
Watervliet/Coloma - Benton Harbor/St. Joseph Shuttle	1	1	Small Bus (< 30')	18/2
Benton Harbor/St. Joseph - Bridgman - Sawyer - New Buffalo Shuttle	1	1	Small Bus (< 30')	18/2
Niles Dial-A-Ride Expansion	2	1	Small Bus (< 30')	10/2
Expanded Hours for Niles Route 2 Service	3	1	Small Bus (< 30')	18/2
Expanded Frequenecy on Niles Route 2	5	1	Small Bus (< 30')	18/2
Watervliet - Coloma Dial-A-Ride	5	1	Small Bus (< 30')	10/2
Total Expansion Vehicles:		10		

Chapter 7

PLANNING CONSIDERATIONS

One of the most important aspects of a countywide arrangement is the planning and operation of transit services from a broad perspective, as opposed to a piecemeal approach. The ability to plan services throughout the County with one system would improve connectivity, reduce costs, and serve customers' mobility needs that cross jurisdictional boundaries. Currently there is an overall lack of coherence to the schedules as there are few route level connections. The customers especially lose in this fragmented approach.

While this study has not involved a formal Transit Development Plan (TDP), it has involved some aspects such as Chapter 4's conceptual Operations Plan. This chapter discusses additional planning considerations, especially those that would improve the effectiveness of current services and expand connectivity through a countywide planning approach.

CURRENT SERVICE ISSUES

Transit systems in Michigan are not required to conduct transit planning efforts on a regular basis through which routes, services, and schedules would be formally evaluated for efficiency and effectiveness. While conducting this study, though, Niles Dial-A-Ride completed a TDP, and as noted in Chapter 4 the results of that plan were considered in the development of the proposed Operations Plan. However, this TDP was only for the Niles Dial-A-Ride service area.

While this study was focused on the feasibility of consolidating the four transit systems, the evaluation of the current systems highlighted a variety of service planning issues and opportunities. For instance, TCATA provides two different forms of public transit that are competing with each other, negating any positive benefits from fixed route services. There is also little coordination and even less connectivity through the routes provided by the four systems. The primary coordination is between Berrien Bus and Buchanan Dial-A-Ride. There is also little marketing of the few connections that do exist between different systems.

The following provides an overview of the key issues identified that should be considered as part of service planning efforts (either as individual systems or as part of a countywide transit system).

TCATA

- **Competing Services** - Some areas of Benton Harbor are served by both TCATA's Dial-A-Ride and fixed route services. This is counter to operations of most transit systems that typically encourage customers to ride fixed route services and only provide demand-response-type services for customers unable to access scheduled fixed route services. Dial-A-Ride service is far more expensive on a per trip basis for a service area the size of Benton Harbor. The focus on Dial-A-Ride services has resulted in strong demand for these services, and customers and stakeholders report long wait times for pickup.
- **No-Show Rate** - TCATA has also reported an increased volume of no-shows. This is partially a result of customers finding other means of transportation after scheduling a ride, spurred by long wait times. When does a trip qualify as late, relieving the customer from waiting for the bus and being declared a no-show?
- **Fixed Route Service Design** - The Red Route is a one hour loop route that is ineffective in its design. Hour loop routes require all riders to travel one hour round trip, even if the destination is less than ten minutes away. Loop routes are almost always ineffective.
- **ADA Paratransit Compliance** - While this project does not involve a formal compliance review of the four transit systems, through the evaluation it was noted that TCATA may be in violation of the Americans with Disabilities Act (ADA). TCATA operates fixed route services until 10:00 p.m., but only markets and operates paratransit services until 5:00 p.m. The ADA requires public transit agencies that provide fixed route service to provide complementary paratransit services to people with disabilities who cannot use the fixed route bus or rail service because of a disability. This service must operate the same hours as fixed route.

Berrien Bus

- **Service Design/Countywide Service** - While demand response services are good in smaller compact communities, providing this type of service in a larger geographic area limits productivity and ensures per trip costs are high due to inherent inefficiencies. Berrien Bus has various pick-up points located throughout the County that are not fully advertised. As noted in Chapter 4, the locations could be a component of future efforts to implement scheduled services to maximize ridership and provide connectivity across the region.
- **Service Hours** - Current transportation services end at 5:00 p.m., and therefore service is not designed to attract commuters or people who work later shifts (potential sources of ridership).

Niles Dial-A-Ride / Buchanan Dial-A-Ride

- **Service Hours** - Similar to Berrien Bus, the major issue for both systems is that the hours of service precludes use by commuters and job access riders who work later shifts. While the Niles Dial-A-Ride TDP proposes expanding services to 6:00 a.m. to 5:30 p.m. on weekdays and 10:00 a.m. to 4:00 p.m. on Saturdays, workers on second shift jobs would still have limited access to public transit services.
- **Connectivity to the East and South** - The recent transit plan conducted for Niles indicated a strong preference for further coordination with South Bend and Cass County to the east, with little reference to Berrien County.

INITIAL BCTA SERVICE PLANNING OPPORTUNITIES

There are few opportunities among the four systems for a customer to get from one end of the county to

another. Buchanan Dial-A-Ride provides connections to Berrien Bus at designated locations that allow customers to transfer and therefore access to locations outside of Buchanan. As noted earlier, these connections are simplified through the fact that the same operator provides services for both systems.

Connectivity is a problem when four systems operate separately, and therefore only plan for their small service area or clientele. The only system with a broader focus is Berrien Bus, simply because the system serves a larger geographic area. However, when considering capacity to provide more extensive countywide service, it is again worth noting that much of the current service operated by Berrien Bus is concentrated on trips provided for human service agencies.

The formation of the BCTA would help provide a stronger focus on service planning. These efforts would include:

- Assessing current shuttle services designed primarily to serve human service agency contracts to determine opportunities to provide more general public transit services while still meeting contractual obligations. A proposed shuttle network was included in the Operations Plan in Chapter 4.
- Leading and facilitating additional coordination opportunities with the other three transit systems in the County, and with other transportation providers. This effort could build upon previous coordination meetings and serve as a forum to conduct more extensive service planning efforts and to discuss opportunities to make changes that would allow greater connections between systems. Greater coordination of service planning efforts can lead to improved linkages between services at major activity centers, expanding mobility options for the residents of the County. This work could also involve evaluation of a fare integration program to help ensure more seamless services.
- Planning and implementation of new services if a millage is proposed and approved.

COUNTYWIDE SERVICE PLANNING

An important component of a more coordinated system or a full consolidation would be connectivity between the various transit systems to provide customers with the ability to travel throughout the County in a seamless manner. Routes can be rationalized and planned as one, possibly reducing service levels without impacting ridership. This planning can include consideration of changes to current TCATA services that allow customers to choose between Dial-A-Ride services and fixed route services, resulting in the two services acting in direct competition with one another.

In addition, coordinated service planning would provide the opportunity to conduct detailed evaluations of current Dial-A-Ride services to determine possible increased use of fixed route or scheduled services, especially in the Benton Harbor area. This service planning could also involve assessment of current fixed routes to ensure that routes are serving both origin locations (i.e. residential areas) and destination locations (i.e. medical facilities or shopping centers), therefore encouraging customer use. Possible restructuring of services to increase use of scheduled services would reduce dispatch staff needed for Dial-A-Ride services, and help to cut down on the current no-show rate. Transit service planning on a countywide level also allows performance measures to be viewed from a broader perspective, and appropriate changes made if services are inefficient or ineffective.

Other transit planning efforts could include assessment of the Berrien Bus services in and out of TCATA's service area that is currently complicated for customers. Many customers who live in the southern portion of the Benton Harbor/St. Joseph urbanized area call Berrien Bus regularly requesting trips, but these areas are not served since most of Berrien Bus operating funds come from the FTA Section 5311 grant program for rural transit service. Also, initial efforts can involve evaluation of improved coordination to provide inter-jurisdictional travel with fewer transfers. For example, both TCATA and Berrien Bus serve the Orchards Mall—but at different entrances and not on a timed schedule.

Additional benefits resulting from coordinated service planning would include having a single transit planning contact in the County. SWMPC staff now needs to work with four systems in regard to service improvements, changing demographics, and land use issues that impact transit planning. In addition, employers, developers, human service agencies, and other key stakeholders would have a specific contact to discuss transit needs and new residential or shopping developments. MDOT would also have a single point of contact for transit planning in Berrien County.

Overall components of improved transit service planning through a consolidated effort would involve:

- Consideration of expanded service in the St. Joseph/Benton Harbor urbanized area outside of the Cities of Benton Harbor, Benton Township, and Royalton. The Section 5307 funding formula of TCATA is based off a 45 sq. mi. area with a population of 61,745. TCATA currently serves a 14 sq. mi. area with a population of 24,700. This is dependent on local funding for the service.
- Detailed evaluation of current Dial-A-Ride services to determine increased use of more efficient fixed route or scheduled services, especially in the Benton Harbor area.
- Assessment of current fixed route services to ensure that routes are serving both origins and destinations, therefore encouraging customers to use these routes as opposed to Dial-A-Ride services.
- Consideration of changes to current TCATA services that allow customers to choose between Dial-A-Ride services and fixed route services, resulting in the two services acting in direct competition with one another.
- Evaluation of a dispatching system for the TCATA system whereby additional information (i.e. names and phone numbers) is obtained for Dial-A-Ride trips. This process can help institute a meaningful no-show policy where steps or fees are assessed. The no-shows should also be defined to allow customers to abandon their ride if it is very late. The best way to deal with this is to restructure routes and eliminate most Dial-A-Ride.
- Assessment of the Berrien Bus services in and out of the TCATA's service area that is currently complicated for customers. Customers who live in the southern portion of the Benton Harbor/St. Joseph urbanized area are not served by Berrien Bus due to "turf" issues and the fact that most Berrien Bus operating funds come from the FTA Section 5311 grant program for rural transit service.
- Evaluation of improved coordination between providers or improved service planning to provide inter-jurisdictional travel with fewer transfers.
- Looking more long-term, the County can undertake a TDP process through a countywide perspective. The last time a countywide plan in regard to transit services was undertaken was by SWMPC in 2009. The recent City of Niles TDP only addressed the Niles Dial-A-Ride system.

FARE INTEGRATION

Another disconnect for customers is that each transit system in Berrien County has its own fare structure. Table 7-1 provides a summary of these various fare programs. An immediate observation is the multitude of fare structures that are in place and that customers must learn to use transit services in the County.

Table 7-1: Current Berrien County Transit Fare Structures

TCATA	Fixed Route Service = \$1 Demand Response Service: Benton Harbor residents = \$2, non Benton Harbor residents = \$3 Demand Response service to, from, or within Royalton Township: Benton Harbor residents = \$4.50, non Benton Harbor residents = \$6 50% discount for seniors and persons with disabilities
Berrien Bus	Service within 5 miles of Berrien Springs = \$2.50 Service beyond 5 miles of Berrien Springs = \$5 50% discount for seniors and persons with disabilities
Buchanan Dial-A-Ride	Service within Buchanan = \$1.50 Service 1 mile beyond Buchanan = \$4 50% discount for seniors and persons with disabilities
Niles Dial-A-Ride	Fixed Route Service = \$2 Dial-A-Ride within Niles = \$3 Dial-A-Ride beyond the Niles City limit = \$4 50% discount for seniors and persons with disabilities

Other issues with the current fare structure include:

- The four systems all have different fares for comparable service. For example TCATA’s service within Benton Harbor is \$2.00, but service to Benton Township is \$3.00. Berrien Bus service within the Berrien Springs area is \$2.50 but similar service outside a five mile zone is \$5.00. Buchanan’s Dial-A-Ride costs \$1.50 and Niles similar service costs \$3.00. The only consistency is that all systems have half fare for seniors and persons with disabilities.
- The various fare structures exhibit inequities in that shorter distance trips may cost more than longer ones based simply on the geography served or where services originate from a transit facility:
 - TCATA has a wide variety of fares for travel to different areas, reflecting the issue of the millage (and lack of) in the different areas it serves.
 - Berrien Bus treats Berrien Springs as the central point from which fares are based. Customers within a five mile radius pay one rate while customers that live outside the zone pay double—even if their trip is shorter. Therefore, the fare structure is simply based on the arbitrary location of the facility and not on cost factors.

There are a number of considerations related to fares that should be addressed through future planning efforts and in the provision of countywide services:

- **Equity** – Parts of TCATA’s service area do not contribute millage to the system. Should residents of these areas pay a higher fare? Currently the fare is based on where one is going—outside the Benton Harbor area in this case. This issue will need to be resolved as part of any consolidation effort.
- **Rationalizing** – In a consolidated system fares will have to be rationalized. For example, all in-town Dial-A-Ride services would be one fare as would any local fixed route service, while intra-county services could be another fare, possibly based on distance.
- **Resident Based Fares** – In lieu of a countywide millage, to ensure equity it may be better to base fares on residency in contributing jurisdictions rather than destination.
- **Berrien Bus Zone System** – Unlike most transit systems that use distance/zone based fares, Berrien Bus bases its fares on where a customer lives. A resident living outside of the five mile zone making a one mile trip pays double what a person inside the zone pays for an eight mile trip.

Chapter 8

MARKETING AND OUTREACH CONSIDERATIONS

This chapter reviews the methods by which public transit services in Berrien County are marketed. Current efforts to advertise available transit services are minimal. Therefore, much of this chapter is focused on future opportunities to improve public outreach through a countywide approach and to ensure that residents are aware of their mobility options.

CURRENT MARKETING AND ADVERTISING

The primary method used by the four transit systems in Berrien County to market their services is through informational brochures. Each system has a basic brochure that details service areas and fare structures. Copies are included in Appendix L.

None of the four systems have a detailed marketing plan. In addition, none of the systems have an independent website, though SWMPC operates a mobility management effort that provides information on the services provided by each system as well as contact information. The www.mywaythere.org website also provides:

- Information on LACs,
- Rider accessibility resources,
- Information on transit training and other training events; and
- Resources such as the Berrien County Transit Study and the Berrien County Coordinated Transit-Human Services Transportation Plan.

Each system has buses branded for their individual service. The vehicles for all four systems are clearly marked with appropriate logos and a positive paint scheme, and while operating as disparate services are very noticeable in their individual communities.

MARKETING AND OUTREACH OPPORTUNITIES

A countywide transit system provides opportunities to improve customer service and to expand awareness of transportation options through increased access to information. These opportunities include:

- **Centralized Public Information:** Each system currently has its own customer information, so a person traveling across the County or between operators must have at least two sets of schedules and telephone numbers (and maybe as many as four). Clearly a countywide approach would allow for one telephone number, one website, one brochure, and a coherent set of countywide schedules. The current mobility management program offers the foundation for such an effort.

- **Tracking Complaints/Commendations:** Currently customer service is tracked in an informal process by various staff at each of the operators. A countywide system would help reduce costs and improve the quality of marketing and the tracking of customer service.
- **On-Line Information:** In a County with four transit systems, it is surprising to see the lack of available on-line information on current transit services beyond SWMPC's mobility management program. A website through a consolidated system would provide the opportunity to provide customers with a single point of access on bus routes and other transportation options in the County. In addition, each system now has its own brochures that could be integrated into one ride guide covering all services in the County that would be available on-line.
- **Branding:** For small transit systems often the best marketing is attractive and clean buses that get noticed for good reasons. A key part of a countywide system would be a branding program to ensure all public transit vehicles in the County meet this criteria and display the same system name and logo. The current situation, with vehicles operating in the County with four different names and markings, only reinforces the disconnect between the systems. Attractive buses, branded with one system name and logo, can be the best marketing for public transit services.

While BCTA would be the legal name for the new organization, if desired "Berrien Bus" could continue to be the name for the transit system. This would mean less confusion for current customers. However, when establishing the BCTA it may be the ideal time to consider a new name as part of a branding/marketing effort. A public contest is one way to involve the community in this process.

A possible consolidation of the four systems provides the opportunity to more fully market transit services in the County and define a consistent image. However, through this process there will need to be consideration of how to have one unified identity while maintaining individual branding and allowing local jurisdictions to feel that they still have their own system. One consideration is to have consistent branding on all buses, but then a specific paint scheme or logo to identify buses that provide a specific service or are designated to provide service in a particular geographic area.

- **Service Design and Productivity:** Marketing can become problematic for Dial-A-Ride services since there are limits on the number of potential riders at any given time. This is often called a productivity ceiling because it is not possible to increase productivity past a certain point simply due to the service design. Therefore, the proposed shift to more scheduled and fixed route services would expand benefits from countywide marketing efforts. Those services do not have the same limitations as Dial-A-Ride services, and are only limited by the size of the fleet.
- **Consistent Fare Structure:** Related to marketing is the need for a consistent fare structure. Coordination on a uniform fare policy is a possible short-term marketing strategy that would allow customers to more easily use and transfer between current services.

STAFFING IMPLICATIONS

There are obvious opportunities for consolidated marketing and advertising through a countywide system. This includes one marketing program with one set of staff addressing marketing and outreach efforts and activities. The staffing plan presented in Chapter 3 recommended continuation of the current mobility manager position. In addition the staffing plan included a Planning/Marketing Manager who would lead the planning activities discussed in the previous chapter and the marketing opportunities presented in this chapter. As noted in the proposed job description, working with the mobility manager the responsibilities for this position would include:

- Developing and supporting marketing plans in order to maximize transit services.
- Designing and producing web-based marketing materials and print newsletters, flyers, and other materials.

- Researching, writing, and disseminating press releases, public service announcements, and feature stories.
- Cultivating and facilitating positive relationships with media and community groups.
- Preparing planning documents for public and governmental review.
- Conducting community outreach forums for discussion of transit issues.

Chapter 9

COUNTYWIDE TRANSIT SERVICES PROPOSED IMPLEMENTATION PROCESS

This chapter serves as the culmination of the planning work discussed in the previous sections. While there are still a number of issues to be addressed and areas that will require agreement, this chapter provides the basic framework and a proposed timeline for implementing a countywide transit system, and can serve as a guide for future efforts and discussions.

PROPOSED IMPLEMENTATION PROCESS

Table 9-1 summarizes the key steps and related activities for implementing a countywide transit system. It is anticipated that while SWMPC led the development of this plan, Berrien County will assume the lead in the formation of the BCTA. The BCTA would then lead efforts to implement a countywide program and to pursue a county millage.

PROJECTED TIMELINE, ACTIVITIES, AND KEY ACTIONS

Table 9-2 proposes a timeline for the implementation process along with key activities and actions. While this timeline provides a realistic foundation for future efforts, it will need to be updated through the various steps based on current conditions and impediments during the process.

As noted in Table 9-2, the proposed timeline is segmented into three phases:

- Phase 1 would involve formation of the BCTA and transition of Berrien Bus to this new organization.
- Phase 2 would focus on the transition of Buchanan Dial-A-Ride, Niles Dial-A-Ride, and TCATA services to BCTA.
- Phase 3 would involve efforts to implement a countywide millage to support public transit services.

Table 9-1: Proposed Implementation Process for Countywide Transit Services

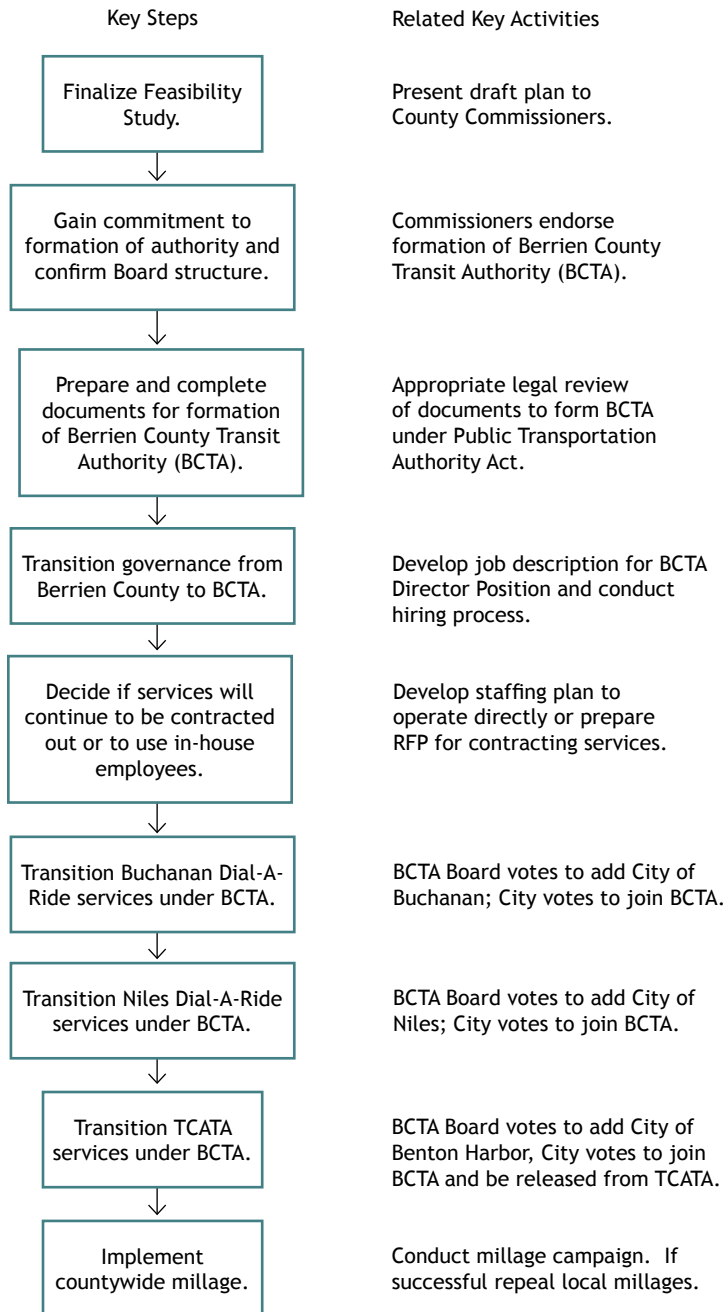


Table 9-2: Projected Timeline, Activities, and Key Actions

Phase 1: Formation of Berrien County Transit Authority (BCTA) and transition of Berrien Bus to BCTA.		
Projected Date	Implementation Activity	Key Actions
April - May 2014	Finalize feasibility study.	<ul style="list-style-type: none"> • Present draft plan to Berrien County Commissioners. • Finalize report based on input. • Develop materials for future presentations as needed to other audiences or local governments.
June 2014 - August 2014	Gain commitment to formation of BCTA and confirm Board structure.	<ul style="list-style-type: none"> • Berrien County Board of Commissioners endorses the formation of the Berrien County Transit Authority (BCTA) through resolution. • Determine Board representation. • Identify and confirm Board members. • Draft Articles of Incorporation and by-laws.
August - October 2014	Prepare and complete appropriate documents to form BCTA.	<ul style="list-style-type: none"> • Conduct legal review of Articles of Incorporation, modify as needed, and complete. • Articles of Incorporation adopted by resolution by a majority of the Board of Directors.
October - November 2014	Hold initial official meeting of the BCTA Board of Directors.	<ul style="list-style-type: none"> • Elect officers. • Adopt by-laws. • Determine appropriate subcommittees. • Confirm vision/mission statements and governing principles. • Discuss composition of advisory committee. • Take any other action the Board deems necessary.
Before October 2014	Extend current contract with TMI.	<ul style="list-style-type: none"> • Current agreement between Berrien County and TMI ends on Sept. 30, 2014. Complete extension through Sept. 30, 2015.
November 2014 - January 2015	Hire BCTA Director and begin process for transition from Berrien County to BCTA.	<ul style="list-style-type: none"> • Develop Executive Director Position description. • Advertise position, conduct interviews. • Make offers, conduct hiring process. • Begin considerations of marketing campaign to include possible renaming of system. • Make necessary preparations for transition. Items include vehicle titles, TMI contract, and accounting and financial systems.
Before October 2015	Determine if services will continue to be contracted out or to use in-house employees.	<ul style="list-style-type: none"> • Develop appropriate staffing plan (based on potential structures included in Ch. 3). • If in-house services, make necessary preparations to include: <ul style="list-style-type: none"> • Develop appropriate employee policies/procedures manual. • Develop drug and alcohol testing and training program. • If contracted services will continue, begin development of RFP package.
TBD	Implement modifications to current Berrien Bus services.	<ul style="list-style-type: none"> • Conduct service planning for shuttle routes proposed in Operations Plan. • Develop conceptual routes and schedules. • Conduct appropriate community outreach to obtain input on proposed shuttle routes. • Finalize shuttle routes and implement. • Transition human service contract to shuttles as appropriate. • Conduct marketing and outreach.
2016 or later	Move operations center from Berrien Springs to Napier Avenue location.	<ul style="list-style-type: none"> • Develop transition plan for moving operations to new location. • Depending on status of other transit systems joining BCTA develop facility plan for using all county transit locations as effectively as possible.

Phase 2: Transition of Buchanan Dial-A-Ride, Niles Dial-A-Ride, and TCATA services to BCTA.		
Projected Date	Implementation Activity	Key Actions
TBD	Transition Buchanan Dial-A-Ride services under BCTA.	<ul style="list-style-type: none"> • Gain consensus on Buchanan Dial-A-Ride becoming part of BCTA. • BCTA votes to add Buchanan Dial-A-Ride services. • Buchanan City Council votes to join BCTA. • Develop agreement for City of Buchanan millage funds to be administered by BCTA. • Assess staffing implications and implement modification as needed.
TBD	Transition Niles Dial-A-Ride services under BCTA.	<ul style="list-style-type: none"> • Gain consensus on Niles Dial-A-Ride becoming part of BCTA. • BCTA votes to add Niles Dial-A-Ride services. • Niles City Council votes to join BCTA. • Develop agreement for City of Niles millage funds to be administered by BCTA. • Assess staffing implications and implement modification as needed
TBD	Implement modifications to current Niles Dial-A-Ride services.	<ul style="list-style-type: none"> • Conduct service planning for Niles Dial-A-Ride services as proposed in Operations Plan. • Conduct public outreach process to obtain input on proposed new services. • Finalize services and implement.
TBD	Transition TCATA services under BCTA.	<ul style="list-style-type: none"> • Gain consensus on TCATA becoming formal part of BCTA. • BCTA votes to add TCATA services. • TCATA Board votes to join BCTA. • Develop agreement for City of Benton Harbor millage to be administered by BCTA. • Assess staffing implications and implement modification as needed.

Phase 3: Conduct campaign to implement a countywide millage to support public transit services.		
Projected Date	Implementation Activity	Key Actions
TBD	Develop process and schedule for implementing countywide millage.	<ul style="list-style-type: none"> • Develop conceptual services that could be funded through countywide millage. • Conduct public outreach campaign.

Appendix A

PUBLIC TRANSPORTATION AUTHORITY ACT (ACT 196 OF 1986)

PUBLIC TRANSPORTATION AUTHORITY ACT
Act 196 of 1986

AN ACT to authorize the formation of public transportation authorities with certain general powers and duties; to provide for the withdrawal of certain local entities from public transportation authorities; to authorize certain local entities to levy property taxes for public transportation service and public transportation purposes; to protect the rights of employees of existing public transportation systems; to provide for the issuance of bonds and notes; to provide for the pledge of taxes, revenues, assessments, tax levies, and other funds for bond or note payment; to provide for the powers and duties of certain state agencies; to validate taxes authorized before July 10, 1986, elections held before July 10, 1986, and bonds and notes issued before July 10, 1986; to provide for transfer of certain tax revenue and certain powers, rights, duties, and obligations; to authorize condemnation proceedings; to grant certain powers to certain local entities; to validate and ratify the organization, existence, and membership of public transportation authorities created before July 10, 1986 and the actions taken by those public transportation authorities and by the members of those public transportation authorities; and to prescribe penalties and provide remedies.

History: 1986, Act 196, Imd. Eff. July 10, 1986;—Am. 1998, Act 168, Eff. Mar. 23, 1999.

The People of the State of Michigan enact:

124.451 Short title.

Sec. 1. This act shall be known and may be cited as the “public transportation authority act”.

History: 1986, Act 196, Imd. Eff. July 10, 1986.

124.452 Definitions.

Sec. 2. As used in this act:

- (a) “Board” means the governing body of a public authority.
- (b) “Goods” means baggage, accessories, or other personal property carried by or accompanying persons using public transportation service.
- (c) “Political subdivision” means a county, city, village, or township. Political subdivision, in relation to those provisions involving an authority created under an interlocal agreement pursuant to the urban cooperation act of 1967, Act No. 7 of the Public Acts of the Extra Session of 1967, being sections 124.501 to 124.512 of the Michigan Compiled Laws, forming a public authority, includes any other entities which entered into the interlocal agreement.
- (d) “Public authority” means an authority created under this act.
- (e) “Public transportation”, “public transportation service”, “public transportation purpose” means the movement of people and goods by publicly or privately owned water vehicle, bus, railroad car, rapid transit vehicle, taxicab, or other conveyance which provides general or special service to the public, but not including charter or sightseeing service or transportation which is exclusively used for school purposes. Public transportation, public transportation services, or public transportation purposes as defined by this section are declared by law to be transportation purposes within the meaning of section 9 of article IX of the state constitution of 1963 .
- (f) “Public transportation facility” means all property, real and personal, which enhances the effectiveness of a public transportation system and is functionally related to a public transportation system or which creates new or enhanced coordination between public transportation and other forms of transportation, including street railways, motor buses, tramlines, subways, monorails, rail rapid transit facilities, tunnels, bridges, and parking facilities and other property owned or leased by a public authority for which the public authority is eligible for federal assistance as administered by the United States department of transportation.
- (g) “Public transportation system” means a system for providing public transportation service, including public transportation facilities.
- (h) “Revenue” means money received by the public authority as provided in section 17.
- (i) “Taxable property” means the property taxable under the general property tax act, Act No. 206 of the Public Acts of 1893, being sections 211.1 to 211.157 of the Michigan Compiled Laws, except for property expressly exempted under that act.

History: 1986, Act 196, Imd. Eff. July 10, 1986.

124.453 Public authority; formation generally; membership; articles of incorporation; approval.

Sec. 3. (1) An authority incorporated under Act No. 55 of the Public Acts of 1963, being sections 124.351

to 124.359 of the Michigan Compiled Laws, or an authority having a population of less than 1,000,000 incorporated under the metropolitan transportation authorities act of 1967, Act No. 204 of the Public Acts of 1967, being sections 124.401 to 124.425 of the Michigan Compiled Laws, may form a public authority under this act. Political subdivisions which are members of an authority described in this subsection which form a public authority shall be members of the public authority.

(2) Formation of a public authority pursuant to subsection (1) may be accomplished by adoption of articles of incorporation by resolution adopted by a majority of the members serving on the governing body of the authority incorporated under Act No. 55 of the Public Acts of 1963 or Act No. 204 of the Public Acts of 1967.

(3) An authority created under an interlocal agreement pursuant to the urban cooperation act of 1967, Act No. 7 of the Public Acts of the Extra Session of 1967, being sections 124.501 to 124.512 of the Michigan Compiled Laws, for the purpose of providing public transportation service may form a public authority under this act. Political subdivisions which have created an entity described in this subsection which form a public authority shall be members of the public authority.

(4) Formation of a public authority pursuant to subsection (3) may be accomplished by adoption of articles of incorporation and by amendment of the interlocal agreement by resolution adopted by a majority of the governing body of each public entity which were parties to the interlocal agreement. In addition, if a separate legal or administrative entity was created under the interlocal agreement, a public authority may be formed pursuant to subsection (3) only with the approval of the entity empowered by the interlocal agreement to bring action in court against other entities, on behalf of the authority created under the interlocal agreement.

History: 1986, Act 196, Imd. Eff. July 10, 1986.

124.454 Public authority; formation by political subdivision; articles of incorporation.

Sec. 4. (1) A political subdivision or a combination of 2 or more political subdivisions may form a public authority under this act. A county with a population between 240,000 and 255,000 may form more than 1 public authority under this act. A city, village, township, or county forming a public authority by itself or in combination with 1 or more other political subdivisions may provide that only a portion of the city, village, township, or county shall become part of the public authority. The portion of the city, village, township, or county to become part of the public authority shall be bounded by precinct lines drawn for election purposes.

(2) Formation of a public authority pursuant to subsection (1) shall be accomplished by adoption of articles of incorporation by an affirmative vote of a majority of the members elected to and serving on the legislative body of each political subdivision.

History: 1986, Act 196, Imd. Eff. July 10, 1986;—Am. 2011, Act 123, Imd. Eff. July 20, 2011.

124.455 Articles of incorporation; endorsement as evidence of adoption; publication; filing; operative public authority; effective date of articles; validity of incorporation conclusively presumed; exception.

Sec. 5. (1) The adoption of articles of incorporation under this act shall be evidenced by an endorsement on the articles of incorporation by the clerk of each respective political subdivision or by the recording officer of the incorporating authority under section 3 in a form substantially as follows:

The foregoing articles of incorporation were adopted by an affirmative vote of a majority of the members serving on the governing or legislative body of _____, _____ at a meeting duly held on the _____ day of _____, A.D., 19__.

(2) The articles of incorporation shall be published by the person or persons designated in the articles at least once in a newspaper designated in the articles and circulated within the area proposed to be served by the public authority. One printed copy of the articles of incorporation shall be filed with the secretary of state, the clerk of each county to be served by the public authority, and the director of the state transportation department by the person designated to do so by the articles. The public authority shall become operative and the articles of incorporation effective at the time provided in the articles of incorporation. The validity of the incorporation shall be conclusively presumed unless questioned in a court of competent jurisdiction within 60 days after the publication of the articles of incorporation.

History: 1986, Act 196, Imd. Eff. July 10, 1986.

124.456 Articles of incorporation; contents.

Sec. 6. The articles of incorporation shall state the name of the public authority; the name or names of the

incorporating authority or the incorporating political subdivisions; the portion of an incorporating city, village, or township to become part of the public authority, if less than the entire city, village, or township is to become part of the public authority; the purposes for which it is formed; the power, duties, and limitations of the public authority and its officers; the composition and method of selecting its governing body and officers; the person or persons charged with the responsibility of causing the articles of incorporation to be published and the printed copies of the articles of incorporation to be filed as provided in this act; the method of amending the articles of incorporation; and any other matters which the incorporators consider advisable.

History: 1986, Act 196, Imd. Eff. July 10, 1986.

124.457 Membership after formation of public authority; resolution; approval, execution, filing, and publication of amendment to articles.

Sec. 7. A political subdivision or a portion of a city, village, or township bounded by lines described in section 4 may become a member of a public authority after the public authority's formation under this act upon resolution adopted by a majority vote of the members elected to and serving on the legislative body of the political subdivision requesting membership for all or a portion of the political subdivision and upon resolution adopted by a 2/3 vote of the members serving on the board of the public authority approving an amendment to the articles of incorporation of the public authority adding all or a portion of the political subdivision. The amendment to the articles of incorporation shall be executed by the clerk of the political subdivision, all or a part of which is being added and shall be filed and published in the same manner as the original articles of incorporation.

History: 1986, Act 196, Imd. Eff. July 10, 1986.

124.458 Conditions to release from membership in public authority; taxes; transportation services; evidence of release; withdrawal from public authority; violation of MCL 168.1 to 168.992 applicable to petitions; penalties; notice.

Sec. 8. (1) Except as otherwise provided in subsection (2), a political subdivision that is a member of a public authority or the portion of a city, village, or township, which portion is a member of a public authority may be released from membership in the public authority if all of the following conditions are met:

(a) Adoption of a resolution by a majority of the members elected to and serving on the legislative body of the political subdivision requesting release from membership.

(b) Acceptance of the request by a 2/3 vote of the members serving on the board of the public authority, excluding the members representing the political subdivision requesting release.

(c) Payment or the provision for payment is made regarding all obligations of the political subdivision to the public authority or its creditors.

(2) Notwithstanding subsection (1), an entity that is a political subdivision and is a member of a public authority or the portion of a city, village, or township, which portion is a member of a public authority, may be released from membership in the public authority if all of the following conditions are met:

(a) The entity desiring to withdraw from the authority has approved the question by a majority of the qualified and registered electors voting at a general or special election held in November before the expiration of a tax authorized to be levied under this act.

(b) Subject to subsection (6), a petition that bears the signatures of registered electors of the entity equal to at least 20% of the number of votes cast in the political subdivision or portion of a city, village, or township for all candidates for governor in the last general election in which a governor was elected and that requires the governing body of the entity by resolution to submit the question to its electors at the next general or special election is filed not less than 60 days before the election with the clerk of the entity presenting the question.

(c) The vote upon the question approving the resolution is by ballot and is in substantially the following form:

"Shall _____ (township, village, city, or other) as provided by 1986 PA 196 withdraw from the authority as a member?

Yes _____

No _____".

(d) All ballots are cast, canvassed, and the results of the election certified in the same manner as ballots on any other question submitted to the electors of the entity seeking withdrawal pursuant to the Michigan election law, 1954 PA 116, MCL 168.1 to 168.992.

(e) Payment or the provision for payment is made regarding all obligations of the political subdivision to the public authority or its creditors. If withdrawal is approved by a majority of the electors voting on the question, the decision will take effect at the expiration date of the tax and neither the authority nor officials of

the political subdivision may appeal or amend this decision.

(3) A tax authorized to be levied by a public authority within the boundaries of the political subdivision or the portion of a political subdivision to be released shall continue to be levied for the period of time originally authorized and shall be paid over to the public authority originally authorized to be the recipient of the tax revenue. A political subdivision or portion of a political subdivision that has been released from an authority shall continue to receive transportation services from the authority until the political subdivision or portion of the political subdivision is no longer required to pay a tax levied by the authority.

(4) Release of a political subdivision or portion of a political subdivision from a public authority shall be evidenced by an amendment to the articles of incorporation executed by the recording officer of a public authority and filed and published in the same manner as the original articles of incorporation.

(5) A political subdivision or other entity that is part of a public authority under this act may withdraw from the public authority until the expiration of the thirtieth day following the date the public authority is incorporated or until the expiration of the thirtieth day after receiving notification under subsection (7), whichever is later, without meeting the conditions listed in subsection (1) or (2). If a public authority under this act has as a member a political subdivision that is part of a metropolitan statistical area, as defined by the United States department of commerce or a successor agency, and the metropolitan statistical area has a population of not less than 600,000 and not more than 1,500,000, a political subdivision or other entity that is part of the public authority may also withdraw from the public authority until the expiration of 30 days after the date on which the board of the public authority adopts a resolution calling for an election for the purpose of levying a tax pursuant to section 18, without meeting the conditions listed in subsection (1) or (2). If all or a portion of a city, village, or township is part of an authority incorporating as a public authority under this act, the city, village, or township may also decide to only withdraw a portion of the entity bounded by the lines described in section 4 from the public authority under the deadline established in this subsection. In addition, a political subdivision or other entity that is part of a public authority under this act may withdraw from the public authority in any year in which a tax authorized to be levied under this act expires, without meeting the conditions listed in subsection (1) or (2), if the political subdivision or entity makes the determination to withdraw by a vote of its legislative body held in January of that year. Further, if all or a portion of a city, village, or township is part of an authority incorporating as a public authority under this act, the city, village, or township may also decide to only withdraw a portion of the entity bounded by the lines described in section 4 from the public authority in that same January. However, if a tax is authorized to be levied in a political subdivision or portion of a political subdivision by a public authority under this act and the political subdivision or portion of a political subdivision withdraws pursuant to this subsection, the tax shall continue to be levied in the political subdivision or portion of a political subdivision for the period of time originally authorized. A political subdivision or portion of a political subdivision that withdraws from the authority shall continue to receive public transportation services from the authority until the political subdivision or portion of the political subdivision is no longer required to pay a tax levied by the authority.

(6) A petition under subsection (2), including the circulation and signing of the petition, is subject to section 488 of the Michigan election law, 1954 PA 116, MCL 168.488. A person who violates a provision of the Michigan election law, 1954 PA 116, MCL 168.1 to 168.992, applicable to a petition described in subsection (2) is subject to the penalties prescribed for that violation in the Michigan election law, 1954 PA 116, MCL 168.1 to 168.992.

(7) An authority that forms under this act on or after May 1, 2006 shall notify all political subdivisions or portions of any city, village, or township that are included in the authority that the political subdivision or portion of the political subdivision is included in the authority. The authority shall include in this notification notice of the right to withdraw from the authority under this section. The political subdivision or portion of the political subdivision that is notified has 30 days after receiving the notification to withdraw from the authority pursuant to subsection (5).

History: 1986, Act 196, Imd. Eff. July 10, 1986;—Am. 1990, Act 10, Eff. Mar. 1, 1990;—Am. 1998, Act 168, Eff. Mar. 23, 1999;—Am. 2006, Act 175, Imd. Eff. June 6, 2006.

124.459 Tax limitations.

Sec. 9. A public authority is intended to and shall be considered to be an authority the tax limitations of which are provided by charter or general law within the meaning of section 6 of article IX of the state constitution of 1963.

History: 1986, Act 196, Imd. Eff. July 10, 1986.

124.460 Validation and ratification of acts taken before effective date of act.

Sec. 10. The organization, existence, membership, and all acts taken before the effective date of this act by

an authority incorporated or purporting to be incorporated under Act No. 55 of the Public Acts of 1963, being sections 124.351 to 124.359 of the Michigan Compiled Laws; an authority having a population of less than 1,000,000 incorporated or purporting to be incorporated under the metropolitan transportation authorities act of 1967, Act No. 204 of the Public Acts of 1967, being sections 124.401 to 124.425 of the Michigan Compiled Laws; or an authority created or purported to be created under an interlocal agreement pursuant to Act No. 7 of the Public Acts of 1967, being sections 124.501 to 124.512 of the Michigan Compiled Laws, are hereby validated and ratified.

History: 1986, Act 196, Imd. Eff. July 10, 1986.

124.461 Assumption, transfer, assignment, or conveyance of tax revenues, property, rights, duties, and obligations.

Sec. 11. (1) All tax revenue, or real or personal property or property rights, money, authorizations to levy a tax, and all other rights, duties, and obligations of an existing authority that forms a public authority in accordance with section 3 shall be assumed by and transferred to the public authority created under this act without execution or delivery of any document or instrument transferring or assigning them.

(2) A political subdivision forming a public authority under this act, including a political subdivision only a portion of which is part of the public authority pursuant to a decision by the legislative body of the political subdivision, may assign or convey any of its tax revenue, real or personal property or property rights, and all other rights, duties, and obligations involving public transportation service to the public authority formed by the political subdivision. However, a transfer or assignment shall not be made which materially adversely affects the contractual rights of a person having a contract with that political subdivision.

History: 1986, Act 196, Imd. Eff. July 10, 1986.

124.462 Powers of public authority generally; public authority as public benefit agency and instrumentality of state.

Sec. 12. A public authority created under this act may plan, promote, finance, acquire, improve, enlarge, extend, own, construct, operate, maintain, replace, and contract for public transportation service by means of 1 or more public transportation systems and public transportation facilities. A public authority is a public benefit agency and instrumentality of the state with all the powers of a public corporation, to accomplish its purposes and to control, operate, administer, and exercise the franchise of the public transportation system and public transportation facilities, if any.

History: 1986, Act 196, Imd. Eff. July 10, 1986.

124.463 Additional powers of public authority.

Sec. 13. A public authority formed under this act shall be a corporate body with power to sue and be sued in any court of the state and shall be considered to be an agency and instrumentality of the state. The public authority shall possess all the powers necessary to carry out the purposes of its formation and all things incident to carrying out the purposes of its formation. The public authority shall be administered in the manner determined by the board and as provided in its articles of incorporation. The public authority by contract may employ a management firm, either corporate or otherwise, to operate the public transportation system, under the supervision of the public authority. The enumeration of powers of this act shall not be construed as a limitation on the general powers of the public authority.

History: 1986, Act 196, Imd. Eff. July 10, 1986.

124.464 Additional powers of public authority.

Sec. 14. A public authority formed under this act, in addition to its other powers and duties, may:

(a) Adopt bylaws and rules of administration to accomplish the purposes of this act.

(b) Provide public transportation service and public transportation facilities within or without the boundaries of the public authority as provided in Act No. 51 of the Public Acts of 1951, being sections 247.651 to 247.674 of the Michigan Compiled Laws, except that a public authority may not provide public transportation service in an area within the boundaries of a member or a released or withdrawn member, other than an entity withdrawing under section 8(5), of another authority formed under this or any other act without the agreement and consent of the other authority.

(c) Acquire and hold, by purchase, lease, grant, gift, devise, land contract, installment purchase contract, bequest, condemnation, or other legal means, real and personal property, including franchises, easements, or rights of way on, under, or above any property within or without the boundaries of the public authority as provided in Act No. 51 of the Public Acts of 1951, and pay for the same from or pledge for the payment thereof, revenue of the public authority. Subject to reasonable use, the public authority may use space and

areas over, under, and upon the public streets and highways to carry out its duties.

(d) Ask appropriate local political subdivisions to begin condemnation proceedings.

(e) Apply for and accept grants, loans, or contributions from the federal government or any of its agencies, the state or other public or private agencies to be used for any of the purposes of this act and to do any and all things within its express or implied powers necessary or desirable to secure that financial or other aid or cooperation in the carrying out of any of the purposes of this act.

(f) Sell, lease, or use any property acquired for the purposes of this act but not needed for those purposes, and lease advertising space and grant concessions for the sale of newspapers and other articles and for services on or in any portion of the property under the jurisdiction of the public authority.

(g) Grant to utilities, public or privately owned, the right to use the property or any part of the property of the public transportation facilities. A public authority formed under this act also may grant to any other public authority formed under this act the right to use any part of the public transportation facilities.

(h) Contract with any other transportation authority or political subdivision of the state or another state or any agency or instrumentality of the state or another state or another nation or private corporation or person for service contracts, joint use contracts, or contracts for the construction or operation of any part of the public transportation facilities.

(i) Investigate transportation requirements, needs, and programs and engage by contract consultants as may be necessary and cooperate with the federal government, state, political subdivisions, and other authorities or transportation agencies in those investigations.

(j) Hire employees, attorneys, accountants, and consultants as the board considers necessary to carry out the purposes of the authority.

(k) Lend money derived from the revenues of the public authority to any persons, corporations, or associations, public or private, for the purpose of financing qualified mass commuting vehicles, as defined in the internal revenue code that will be leased or sold to the public authority and to sell and lease or purchase back mass commuting vehicles, as defined in the internal revenue code.

(l) Impose and collect rents, charges, fees, or fares from users of public transportation services or public transportation facilities.

(m) Exercise all other powers incidental, necessary, or convenient for the exercise of the powers granted in this act.

History: 1986, Act 196, Imd. Eff. July 10, 1986.

124.465 Collective bargaining agreements; employees entering military service.

Sec. 15. (1) A public authority formed under this act shall have the right to bargain collectively and enter into agreements with labor organizations pursuant to Act No. 336 of the Public Acts of 1947, being sections 423.201 to 423.216 of the Michigan Compiled Laws. Upon acquisition or reincorporation of a public transportation system, the public authority shall assume and be bound by any existing collective bargaining agreements applicable to that system for the remainder of the term of the agreement, and, except where the existing collective bargaining agreement may otherwise permit, shall retain the employees covered by that collective bargaining agreement. The acquisition or reincorporation of a public transportation system by the public authority shall not adversely affect any existing rights and obligations contained in the existing collective bargaining agreement. Members and beneficiaries of any pension or retirement system established by the existing public transportation system shall continue to have the same rights, privileges, benefits, obligations, and status under the new public authority.

(2) If an existing collective bargaining agreement is expiring at the time of acquisition or reincorporation of a public transportation system to a public authority under this act, the acquisition or reincorporation does not affect the obligation of each of the parties to bargain collectively pursuant to the requirements of Act No. 336 of the Public Acts of 1947.

(3) Employees who left the employ of the acquired public transportation system to enter the military services of the United States shall have the same rights as to the public transportation system established by the public authority pursuant to Act No. 263 of the Public Acts of 1951, being sections 35.351 to 35.356 of the Michigan Compiled Laws, as they would have had under the acquired public transportation system.

History: 1986, Act 196, Imd. Eff. July 10, 1986.

124.466 Exemption of public authority from certain acts in exercise of powers.

Sec. 16. In the exercise of its powers within the boundaries of the public authority, a public authority is exempt from the motor carrier act, Act No. 254 of the Public Acts of 1933, being sections 475.1 to 479.20 of the Michigan Compiled Laws; Act No. 3 of the Public Acts of 1939, being sections 460.1 to 460.8 of the Michigan Compiled Laws; and Act No. 432 of the Public Acts of 1982, being sections 474.101 to 474.141 of

History: 1986, Act 196, Imd. Eff. July 10, 1986.

124.467 Public transportation service; financing.

Sec. 17. Public transportation service, including any public transportation system and public transportation facilities, may be financed by the public authority by any 1 or more of the following means:

- (a) By service charges, fees, or fares to users of the public transportation services.
- (b) By funds disbursed by the state to the public authority and usable by the public authority.
- (c) By any other income or revenue, including appropriations or contributions, or other revenue of the members of the public authority and any political subdivisions.
- (d) By grants, loans, appropriations, payments, or contributions from the federal government, this state, another state or other governmental units and grants, contributions, gifts, devises, or bequests from public or private sources.
- (e) By proceeds of ad valorem taxes, special assessments, or charges imposed pursuant to law and collected by the state or a political subdivision or the public authority and returned or paid to the public authority pursuant to law or contract.
- (f) By proceeds of an income tax as may be provided by law.
- (g) By issuance of bonds or notes as provided by this act.
- (h) By means of land contracts, installment purchase contracts, or leases authorized by this act.

History: 1986, Act 196, Imd. Eff. July 10, 1986.

124.468 Tax levy; collection.

Sec. 18. (1) A public authority formed under this act may levy a tax on all of the taxable property within the limits of the public authority for public transportation purposes as authorized by this act.

(2) The tax authorized in subsection (1) shall not exceed 5 mills of the state equalized valuation on each dollar of assessed valuation of taxable property within the limits of the applicable public authority.

(3) The tax authorized under subsection (1) shall not be levied except upon the approval of a majority of the registered electors residing in the public authority affected and qualified to vote and voting on the tax at a general or special election. The election may be called by resolution of the board of the public authority. The recording officer of the public authority shall file a copy of the resolution of the board calling the election with the clerk of each affected county, city, or township not less than 60 days before the date of the election. The resolution calling the election shall contain a statement of the proposition to be submitted to the electors. Each county, city, and township clerk and all other county, city, and township officials shall undertake those steps to properly submit the proposition to the electors of the county, city, and township at the election specified in the resolutions of the public authority. The election shall be conducted and canvassed in accordance with the Michigan election law, 1954 PA 116, MCL 168.1 to 168.992, except that if the public authority is located in more than 1 county, the election shall be canvassed by the state board of canvassers. The results of the election shall be certified to the board of the public authority promptly after the date of the election. Not more than 1 election may be held in a public authority in a calendar year for approval of the tax authorized under subsection (1). If the election is a special election, the public authority in which the election is held shall pay its share of the costs of the election.

(4) Except as otherwise provided in this subsection, the taxes authorized by this section may be levied at a rate and for a period of not more than 5 years as determined by the public authority in the resolution calling the election and as set forth in the proposition submitted to the electors. Taxes may be levied at a rate and for a period of not more than 25 years as determined by the public authority in the resolution calling the election and as set forth in the proposition submitted to the electors if the public authority seeking the levy is seeking the levy for public transit services that include a fixed guideway project authorized under 49 USC 5309.

(5) The tax rate authorized by this section shall be levied and collected as are all ad valorem property taxes in the state and the recording officer of the public authority shall at the appropriate times certify to the proper tax assessing or collecting officers of each tax collecting county, city, and township the amount of taxes to be levied and collected each year by each county, city, and township. Consistent with subsection (6), the board of the public authority shall determine on which tax roll, if there be more than 1, of each county, city, or township that the taxes authorized by this section shall be collected. Each tax assessing and collecting officer and each county treasurer shall levy and collect the taxes certified by the public authority and pay those taxes to the public authority by the time provided in section 43 of the general property tax act, 1893 PA 206, MCL 211.43. The tax rate authorized by this section may be first levied by the public authority as a part of the first tax roll of the appropriate counties, cities, and townships occurring after the election described in subsection (3). The tax may be levied and collected on the July or December tax roll next following the date of election,

if the tax is certified to the proper tax assessing officials not later than May 15 or September 15, respectively, of the year in which the election is held.

(6) A public authority which is authorized to impose a July property tax levy and if it determines to do so, it shall negotiate agreements with the appropriate cities and townships for the collection of that levy. If a city or township and the public authority fail to reach an agreement for the collection by the city or township of the July property tax levy of the public authority, the public authority then may negotiate, until April 1, a proposed agreement with the county treasurer to collect its July property tax levy against property located in that city or township. If the county treasurer and the public authority fail to reach an agreement for the collection by the county of the July property tax levy of the public authority, the July property tax levy shall be collected with the December property tax levy. Any agreement negotiated under this subsection shall guarantee the collecting unit its reasonable expenses. The provisions of this subsection shall not apply to a city or township which is levying a July property tax.

(7) If, pursuant to subsection (6), the public authority has reached a proposed agreement with a county treasurer on the collection of its July property tax levy against property located in a city or township with which an agreement to collect this levy could not be made pursuant to subsection (6), the public authority shall notify by April 15 that city or township of the terms of that fact and the city or township shall have 15 days in which to exercise an option to collect the public authority's July property tax levy.

(8) Collection of all or part of a public authority's property tax levy by a treasurer pursuant to subsection (6) or (7) shall comply with all of the following:

(a) Collection shall be either 1/2 or the total of the property tax levy against the properties, as specified for that year in the resolution of the public authority.

(b) The amount the public authority has agreed to pay as reasonable collection expenses shall be stated in writing and reported to the state treasurer.

(c) Taxes authorized to be collected shall become a lien against the property on which assessed, and due from the owner of that property, on July 1.

(d) Taxes shall be collected on or before September 14 and all taxes and interest imposed pursuant to subdivision (f) unpaid before March 1 shall be returned as delinquent on March 1. Taxes delinquent under this subdivision shall be collected pursuant to the general property tax act, 1893 PA 206, MCL 211.1 to 211.157.

(e) Interest shall be added to taxes collected after September 14 at that rate imposed by section 59 of the general property tax act, 1893 PA 206, MCL 211.59, on delinquent property tax levies which became a lien in the same year.

(f) All or a portion of fees or charges, or both, authorized under section 44 of the general property tax act, 1893 PA 206, MCL 211.44, may be imposed on taxes paid before March 1 and shall be retained by the treasurer actually performing the collection of the July property tax levy of the public authority, regardless of whether all or part of these fees or charges, or both, have been waived by the township or city.

(9) An agreement for the collection of a July property tax levy of a public authority with a county treasurer shall include a schedule for delivering collections to the public authority.

(10) To the extent applicable and consistent with the requirements of this section, the general property tax act, 1893 PA 206, MCL 211.1 to 211.157, shall apply to proceedings in relation to the assessment, spreading, and collection of taxes pursuant to this section. Additionally, in relation to the assessment, spreading, and collection of taxes pursuant to this section, the county treasurer shall have powers and duties similar to those prescribed by the general property tax act, 1893 PA 206, MCL 211.1 to 211.157, for township supervisors, township clerks, and township treasurers. However, this section shall not be considered to transfer any authority over the assessment of property.

(11) If a county treasurer collects the July property tax levy of the public authority, the township or city shall deliver by June 1 a certified copy of the assessment roll containing state equalized valuations for each parcel of taxable property in the township or city to the treasurer collecting the July property tax levy of the public authority. The county treasurer receiving this certified copy of the assessment roll shall remit the necessary cost incident to the reproduction of the assessment roll to the township or city.

(12) A county treasurer collecting taxes pursuant to this section shall be bonded for tax collection in the same amount and in the same manner as a township treasurer would be for undertaking the duties prescribed by this section.

(13) An agreement for the collection of a July property tax levy between a public authority and a county may cover July collections for 2 years. If an agreement covers July collections for 2 years, the notice required by subsection (7) and the option to reconsider provided by subsection (7) shall not apply for July collections in the second year.

(14) If collections are made pursuant to this section by a county treasurer, all payments from a public authority for collecting its July property tax levy and all revenues generated from collection fees shall be

deposited, when received or collected, in a fund, which fund shall be used by the county treasurer to pay for the cost of collecting the public authority's July property tax levy.

History: 1986, Act 196, Imd. Eff. July 10, 1986;—Am. 2006, Act 175, Imd. Eff. June 6, 2006.

124.469 Additional tax levy.

Sec. 19. Any member of the public authority or a political subdivision otherwise granted taxing authority under state law may levy a tax on all of the taxable property within the limits of the political subdivision, and appropriate, grant, or contribute the proceeds of the tax to the public authority for public transportation purposes as authorized by this act or to provide sufficient money to fulfill its contractual obligation to the public authority under section 20, which tax shall be within charter, statutory, and constitutional limitations.

History: 1986, Act 196, Imd. Eff. July 10, 1986.

124.470 Contract with public authority to make payments, appropriations, or contributions; pledge of full faith and credit; tax levy; execution of contract.

Sec. 20. (1) Any member of the public authority or a political subdivision may contract with the public authority to make payments, appropriations, or contributions to the public authority of the proceeds of taxes, special assessments, or charges imposed and collected by the political subdivision or out of any other funds legally available.

(2) Any member of the public authority or a political subdivision may pledge its full faith and credit for payment of its contractual obligation to the public authority.

(3) If the public authority has issued notes or bonds in anticipation of payments, appropriations, or contributions to be made to the public authority pursuant to contract by a member of the public authority or a political subdivision, the political subdivision may levy a tax, subject to all appropriate statutory and constitutional requirements, on all taxable property in the political subdivision to provide sufficient money to fulfill its contractual obligation to the public authority, which tax as to rate or amount will be as provided in section 6 of article IX of the state constitution of 1963.

(4) Any member or political subdivision desiring to enter into a contract under subsection (1) shall authorize by resolution of its governing body the execution of the contract.

(5) Any political subdivision that forms or becomes a member of the public authority under this act and, before the effective date of the formation or membership, has authorized the levy of a tax to provide money for public transportation purposes or has imposed or collected special assessments or charges for public transportation purposes may levy or impose and collect the tax or special assessment or charge and contract with the public authority to make payments, appropriations, or contributions to the public authority of the proceeds of the taxes, special assessments, or charges, subject to conditions of the original authorization.

History: 1986, Act 196, Imd. Eff. July 10, 1986.

124.471 Duties of public authority.

Sec. 21. Each public authority created under this act shall do the following:

(a) Obtain an annual audit in accordance with sections 6 to 13 of Act No. 2 of the Public Acts of 1968, being sections 141.426 to 141.433 of the Michigan Compiled Laws. The audit shall also be in accordance with generally accepted government auditing standards as promulgated by the United States general accounting office and shall satisfy federal regulations relating to federal grant compliance audit requirements. A copy of the annual audit shall be filed with the state treasurer in accordance with section 4(2) of Act No. 2 of the Public Acts of 1968, being section 141.424 of the Michigan Compiled Laws and a copy shall be filed with the state transportation department in accordance with section 10h(2) of Act No. 51 of the Public Acts of 1951, being section 247.660h of the Michigan Compiled Laws.

(b) Prepare budgets and appropriations acts in accordance with sections 14, 15(1)(a) to 15(1)(g), 15(1)(i), 15(2), 16, 17, 18, and 19 of the Uniform Budget Act, Act No. 2 of the Public Acts of 1968, being sections 141.434 to 141.439 of the Michigan Compiled Laws.

(c) If ending a fiscal year in a deficit condition, file a financial plan to correct the deficit condition in the same manner as provided in section 21(2) of Act No. 140 of the Public Acts of 1971, being section 141.921 of the Michigan Compiled Laws. A copy of the financial plan shall also be filed with the state transportation department.

History: 1986, Act 196, Imd. Eff. July 10, 1986.

124.472 Notes and bonds generally.

Sec. 22. A public authority may, by resolution of its board, borrow money and issue its notes and bonds in anticipation of the collection of taxes and other revenues for its then next succeeding fiscal year, or the taxes

or other revenue for its current fiscal year to provide funds for operating purposes or for capital purposes related to public transportation facilities.

History: 1986, Act 196, Imd. Eff. July 10, 1986.

124.473 Notes and bonds; additional provisions; tax exemption; advancing money or delivering property to carry out powers and duties; repayment or payment.

Sec. 23. (1) A public authority may borrow money and issue notes and bonds to acquire, construct, or purchase public transportation facilities and to otherwise finance and carry out its powers and duties. The notes and bonds may pledge, be payable from, and may be issued in anticipation of payment of the proceeds of any of the methods of financing described in section 17 or elsewhere in this act or as may be provided by law.

(2) The public authority may issue bonds or notes at any time to retire, fund, or refund, in whole or in part, outstanding bonds or notes issued pursuant to this act, or for transportation purposes under any other act including the payment of interest accrued, or to accrue, to the earliest or any subsequent date of redemption, purchase, or maturity of the bonds or notes, redemption premium, if any, and any commission, service fees, and other expenses necessary to be paid in connection with the bonds or notes, whether the bonds or notes to be refunded have matured or are redeemable or shall at a later date mature or become redeemable. If considered advisable by the public authority, the public authority may issue bonds or notes partly to refund outstanding bonds or notes and partly for any other purpose contemplated by this act.

(3) The bonds and notes issued pursuant to section 22 or this section may be issued pursuant to, and shall be subject to the revised municipal finance act, 2001 PA 34, MCL 141.2101 to 141.2821.

(4) The public authority, by resolution of its board, shall provide for the issuance of the notes or bonds for the purpose of paying part or all of the cost of the public transportation facilities or authorized programs, which cost may include an allowance for legal, engineering, architectural, and consulting services; interest on the bonds or notes becoming due before the collection of the first revenue available for the payment of the interest as determined by the authority; a debt service reserve; and other necessary incidental expenses. Principal of, and interest and redemption premiums on, the bonds or notes issued under this section shall be payable solely from revenue, the other sources described in this section, or otherwise described in this act. Any interest shall be payable on the dates as determined in the resolution authorizing the issuance of the bonds or notes. The board of the public authority, in the resolution authorizing the issuance of the bonds or notes shall determine the principal amount of the bonds or notes to be issued, the registration provisions, the bond or note denominations, the bond or note designations, the rights of prior redemption of the bonds or notes at the option of the public authority or the holders of the bonds or notes, the maximum rate of interest, the method of execution of the bonds or notes, and any other provisions respecting the bonds or notes, the rights of the holders of the bonds or notes, the security for the bonds or notes, and the procedures for disbursement of the bond or note proceeds and for the investment of the proceeds of bonds or notes and money for the payment of bonds or notes. The board of the public authority in the resolution authorizing the issuance of bonds or notes may provide for the assignment of the revenues pledged to 1 of the paying agents for the bonds or notes or to a trustee, as provided in this act. The board of the public authority, in the resolution or resolutions authorizing the bonds or notes, may provide for the terms and conditions upon which the holders of the bonds or notes, or any portion of the bond or noteholders or any trustee for the bond or noteholders, shall be entitled to the appointment of a receiver. The resolution authorizing the bonds or notes may provide for the appointment of a trustee for the bond or noteholders, may give to the trustee the appropriate rights, duties, remedies, and powers, with or without the execution of a deed of trust or mortgage, necessary and appropriate to secure the bonds or notes.

(5) All bonds and notes and the interest coupons attached to the bonds or notes are declared to be fully negotiable and to have all of the qualities incident to negotiable instruments under the uniform commercial code, 1962 PA 174, MCL 440.1101 to 440.11102, subject only to the provisions for registration of the bonds or notes which may appear on the bonds or notes.

(6) The property of the authority, its income and operation, and any vendor, vendee, lessor, and lessee interest in any property sold or leased pursuant to section 24 shall be exempt from all taxation by this state or any of its political subdivisions and all bonds and notes of the authority, the interest on the bonds and notes, and their transfer shall be exempt from all taxation by this state or any of its political subdivisions. This state covenants with the purchasers and all subsequent holders and transferees of notes and bonds issued by the authority under this act, in consideration of the acceptance of and payment for the notes and bonds, that the notes and bonds of the fund, issued pursuant to this act, the interest on the notes and bonds, the transfer of the bonds or notes, and all its fees, charges, gifts, grants, revenues, receipts, and other money received or to be received and pledged to pay or secure the payment of the notes or bonds shall at all times be free and exempt

from all state or local taxation as provided by the laws of this state.

(7) The public authority may issue additional bonds or notes with respect to the pledge of the revenues with previously issued bonds or notes of the public authority for the purpose and under the terms and conditions provided in the resolution authorizing the previous issue of bonds. The public authority may enter into agreements with the holders of the bonds or notes or with others for the bonds or notes to be delivered to the public authority or others before the stated maturities of the bonds or notes.

(8) This state, a political subdivision, or a private corporation, partnership, or individual may advance money or deliver property to the public authority to finance or to carry out its powers and duties. The public authority may agree to repay the advances or pay for the property within a period not exceeding 40 years, from the proceeds of its bonds or notes or from other funds legally available for use, with or without interest as may be agreed at the time of advance or of repayment. The obligation of the public authority to make the repayment or payment may be evidenced by a contract or note or notes, which contract or note may pledge the full faith and credit of the public authority, but the contract or note shall not be an obligation within the meaning of the revised municipal finance act, 2001 PA 34, MCL 141.2101 to 141.2821. A political subdivision, subject to applicable constitutional limitations and procedures, may pledge its full faith and credit for the payment of bonds or notes of the public authority upon adoption of a resolution or a majority vote of the members elected to and serving on its governing body so providing.

History: 1986, Act 196, Imd. Eff. July 10, 1986;—Am. 2002, Act 335, Imd. Eff. May 23, 2002.

124.474 Loans.

Sec. 24. The public authority may lend money including money derived from the proceeds of sale of its bonds or notes to another public authority, a political subdivision, any other public entity, or a private corporation, partnership, or individual for the purpose of financing qualified mass commuting vehicles, as defined in the internal revenue code, that will be leased or sold to the public authority and to sell and lease or purchase back mass commuting vehicles, as defined in the internal revenue code. For that purpose, the public authority may borrow money and issue bonds or notes, enter into loan agreements, leases, or purchase agreements and any other agreements including indemnification agreements as are necessary or appropriate in the judgment of the board to accomplish purposes of this section.

History: 1986, Act 196, Imd. Eff. July 10, 1986.

124.475 Revenues pledged for payment of debt service on bonds or notes subject to statutory lien; substitution of other security.

Sec. 25. The revenues pledged for payment of debt service on bonds or notes shall be and remain subject to a statutory lien until the payment in full of the principal of and interest on the bonds or notes unless the resolution authorizing the bonds or notes provides for earlier discharge of the lien by substitution of other security. The pledge of revenues and any statutory lien that exists for the payment of debt service on bonds or notes shall be effective for all purposes without the delivery of any evidence in this regard or any recording.

History: 1986, Act 196, Imd. Eff. July 10, 1986.

124.476 Investments; use of investment income.

Sec. 26. (1) The public authority may invest any of its money in 1 or more of the following:

(a) Direct obligations of the United States and obligations the principal and interest of which are unconditionally guaranteed by the United States.

(b) Certificates of deposit issued or bank accounts in any bank, trust company, or savings institution whose deposits are insured by the federal deposit insurance corporation or federal savings and loan insurance company.

(c) Prime commercial paper having the highest rating given by a rating service which the department of treasury determines rates the majority of the bond and note issues of the state.

(d) Repurchase agreements with any bank or trust company which is a member of the federal deposit insurance corporation and which are secured by any of the types of securities which are obligations described in subdivisions (a), (b), or (c).

(2) Investment income may be used by the public authority for any purpose for which any other money of the public authority may be used and may be pledged or dedicated in whole or in part to a special purpose including payment of debt service on bonds or notes, as the board determines.

History: 1986, Act 196, Imd. Eff. July 10, 1986.

124.477 Notes and bonds as securities.

Sec. 27. The notes and bonds of the authority are securities in which the public officers and bodies of this

state, municipalities, and municipal subdivisions, insurance companies, associations, and other persons carrying on an insurance business, banks, trust companies, savings banks and savings associations, savings and loan associations, investment companies, and administrators, guardians, executors, trustees, and other fiduciaries, and all other persons who are authorized to invest in bonds or other obligations of the state may properly and legally invest funds.

History: 1986, Act 196, Imd. Eff. July 10, 1986.

124.478 Validation and ratification of prior acts.

Sec. 28. The authorization, issuance, sale, execution, and delivery of all issues of bonds and notes authorized, issued, sold, executed, or delivered by an authority before the effective date of this section, and all acts taken by an authority in connection with those bonds and notes are hereby validated and ratified.

History: 1986, Act 196, Imd. Eff. July 10, 1986.

124.479 Duration of financial obligation.

Sec. 29. Notwithstanding any other provision of this act, a political subdivision may obligate itself financially for a period over 5 years from the date the obligation is undertaken only if approved by majority vote of the electorate of the political subdivision.

History: 1986, Act 196, Imd. Eff. July 10, 1986.

Appendix B

REGIONAL TRANSIT AUTHORITY OF SOUTHEAST MICHIGAN MASTER AGREEMENT WITH PUBLIC TRANSPORTATION PROVIDERS

Regional Transit Authority Master Agreement with Public Transportation Providers

PREAMBLE

The Regional Transit Authority of Southeast Michigan is a public corporation created under Act No. 387 of the Public Acts of 2012 and a metropolitan authority authorized by Section 27 of Article VII of the Michigan Constitution of 1963.

Under the Regional Transit Authority (the “RTA Act”) Act, Act No. 387 of the Michigan Public Acts of 2012, the authority has specific powers and obligations to coordinate public transit services between the region’s transit service providers and to plan for and develop new service. These powers and obligations place the RTA in the position of guiding and coordinating the use of state and federal transit funds that come to the region. Of particular importance to this role are the following provisions from the RTA Act:

PLANNING AND COORDINATION – Section 7 (3)

- The authority shall integrate the existing plans of former designated recipients into a single regional master transit plan, may amend the regional master transit plan from time to time, and must update the plan annually.
- The authority shall coordinate the operating and capital transit plans of transportation agencies and authorities within the public transit region.

PLANNING AND COORDINATION – Section 8 (11) and (12)

- To remain eligible for state funds, a public transportation provider shall annually submit a report to the RTA Board describing and evaluating the provider’s effort to coordinate service with other public transportation providers in the region.
- The authority shall coordinate service overlap, rates, routing, scheduling, and any other function that the authority considers necessary to implement or execute the regional transit master plan. The RTA may issue coordination directives regarding public transportation services, including, but not limited to, routes, schedules, and fares and may withhold up to five percent of the allocation of state funding if a provider fails to comply with a coordination directive of the authority.

FEDERAL FUNDS – Section 8 (1)-(4)

- The authority is the designated recipient for the purpose of applying for all federal operating and capital grant funds available from the U.S. Department of Transportation and its administrations. The authority may opt to make application to the federal government on behalf of the region's transit providers or it may execute a supplemental agreement conferring upon a public transit provider the right to directly receive and dispense federal grant funds. Regardless of whether the authority submits the application or a provider submits the application, the board must review and approve all applications by transit providers for federal funds before such applications may be submitted. If a transit provider submits a federal application that has not been approved by the board, the application is not eligible for state matching funds.

STATE FUNDS – Section 8 (5)-(8)

- All public transit providers in the region must submit their annual funding requests for state CTF funds, including local bus operating (LBO) assistance, to the authority. The authority will aggregate the funding requests from the region's transit providers and submit a single consolidated application to the state. The Michigan Department of Transportation (MDOT) shall award funds only to the authority which shall distribute them to transit providers.
- The authority shall monitor and provide oversight for the expenditure of state funds by transit providers.
- If MDOT approves state matching funds for an application for federal grant funds, MDOT, with the approval of the authority, may award the state matching funds directly to the transit provider that is the federal grant recipient.

PURPOSE

The purpose of this Master Agreement with the Public Transportation Providers is to detail how RTA will approach its role and to clarify the working relationship between RTA and the existing transit providers within the region, including the funding relationship. The transportation providers covered by this agreement are the Detroit Department of Transportation (DDOT), the Suburban Mobility Authority for Regional Transportation (SMART), the Ann Arbor Area Transportation Authority (AAATA) and the Detroit Transportation Corporation (DTC).

The relationship between SMART and Lake Erie Transit remains outside of scope of this Agreement because Monroe County is not currently part of the RTA. SMART may continue to conduct business on behalf of Lake Erie Transit, such as submitting state and federal funding applications, with no involvement of the RTA for the duration of this agreement.

The RTA role and its relationship to providers will evolve over time and as such this Agreement is broken into three sections, spelling out the role and relationships for the following three periods of time:

Article I: Present until September 30, 2013;

Article II: October 1, 2013 until September 30, 2014 (FY 2014); and,

Article III: October 1, 2014 until September 30, 2015 (FY 2015).

This Agreement is intended to provide clarity and certainty for transit providers for the foreseeable future regarding planning, coordination of services, state, and federal funding, and operations. References to federal funds throughout this Agreement pertain only to federal funds provided by the U.S. Department of Transportation and its administrations; funds provided by other federal agencies are not subject to this Agreement.

This Agreement is intended to be a “living document” that will be amended from time-to-time to more fully articulate the relationship between the RTA and providers of public transportation in the transit region. For example, it is anticipated that future addenda to this Agreement will include sections on planning and the use of planning funds, performance standards, and asset management plans.

ARTICLE I. Present until September 30, 2013 **(FY 2013 State and Federal Funds)**

Planning

The RTA Act requires RTA to adopt the plans of the designated recipients that existed on the date the act was signed into law. There were two plans: the Regional Transit Coordinating Council (RTCC) plan from November 2008 and the Transit Master Plan for Washtenaw County. The Board adopted these two plans in May 2013 and as such created the initial regional master transit plan. AAATA, DDOT, SMART and the DTC may also have individual service and financial plans that guide their current operations and capital investments.

During this period of time, all transit providers shall continue to follow the existing regional master transit plan as it was adopted by the Board in May, 2013 and any additional local transit plans. Providers are required to keep RTA informed of the content and changes to their local transit plans.

Service Coordination

The RTA, through its Public Transportation Provider Advisory Committee (PAC) and the Planning and Service Coordination Committee (PSCC), will work to identify service coordination opportunities among providers in the region. While the law allows the RTA to

issue “coordination directives;” the RTA will not issue such directives in FY 2013.

Since RTA does not presently have a “brand,” all transit providers will continue to use whatever branding they are using currently for services.

State Funding – All Programs

All transit providers in the region will continue to receive disbursements of state funds, including matching funds and local bus operating (LBO) funds from MDOT for the remainder of FY 2013 with no influence or involvement of the RTA.

Federal Funding

For the Washtenaw County urbanized area (UZA) and AAATA, the RTA confers the right to receive and dispense all federal funds in accord with the Transit Master Plan for Washtenaw County and AAATA’s priorities.

For the providers in the Detroit UZA (SMART, DDOT, and DTC), federal formula funds have been sub-allocated by Southeast Michigan Council of Governments (SEMCOG) in accordance with the new formula adopted by SEMCOG at its April, 2013 meeting. Upon sub-allocation, the RTA confers the right to each provider to receive and dispense all federal funds in accordance with RTCC plan, individual provider transit plans and the priorities of each provider.

For state matching funds, providers shall continue to work directly with MDOT; providers do not need to involve the RTA.

For federal discretionary funds, all transit providers may continue to make application for, receive and dispense or expend federal discretionary funds with no further involvement of the RTA.

Operations

All transit providers in the region shall continue to abide by their own internal operating policies and procedures, such as but not limited fare policies, personnel manuals and handbooks, procurement procedures and manuals, service standards, budget manuals, salary policies, etc. Existing local partnerships, such as funds a provider passes through to non-profit entities via agreement or contract, remain under the sole jurisdiction of each individual transit provider and will not be subject to RTA review or discussion.

Local Funds

All local funds, including fare box, millage proceeds, general fund contributions, advertising, and existing local contracts will remain under the sole jurisdiction of each individual transit provider.

Public Involvement and Outreach

Each transit provider shall continue to conduct the public involvement and outreach needed to meet its individual obligations to the public and under federal and state law and its respective policies. The RTA will have regional public involvement and outreach activities, such as the Citizen Advisory Committee required under state law, and each provider will participate in regional public outreach efforts as needed to make those efforts productive and meaningful to the public and the RTA.

ARTICLE II: October 1, 2013 until September 30, 2014 **(FY 2014 State and Federal Funds)**

Planning and Service Coordination

All transit providers in the region will continue to abide by the existing regional master transit plan and their respective local transit plans. It is anticipated that the RTA, working with transit providers and SEMCOG, will update the regional transit master plan sometime during this period.¹ Once updated, the regional master transit plan will be the primary driver for the investment of state and federal transit funds, and will govern new transit development for the region.

Under the RTA Act, each provider must annually submit a report to the Board describing and evaluating the provider's effort to coordinate service with other public transportation providers in the region. After discussion with the Provider Advisory Committee (PAC), the Executive and Policy Committee will set a date in FY 2014 by which the first annual report is to be submitted to the RTA. These reports will be reviewed and discussed in detail at the PAC and the Executive and Policy Committee. Using these reports and other information gathered by the RTA, the RTA will work to identify service coordination opportunities. The RTA board anticipates issuing "coordination directives" to one or more transit providers during this period, and in response, the affected transit provider(s) shall modify their transit plan and service delivery to comply with the coordination directive(s).

Until the first annual reports are prepared and the regional master transit plan is updated, and until and unless the RTA issues a coordination directive, all providers shall continue to provide service in accord with the existing regional master transit plan and their individual transit plans, policies and procedures.

¹ Funding for the regional transit plan update and the RTA's overall role in the programming of planning funds will be handled in an addendum to this Master Agreement. The planning addendum will address planning funding available to transit providers, funding available to SEMCOG and other state or federal sources of planning funds. The planning addendum will be drafted after additional detailed discussion at the PAC that includes SEMCOG.

State Funding

Transit providers have already engaged in detailed budget planning for FY 2014. The following procedures will apply to FY 2014 state funds:

- Each provider shall continue to work directly with MDOT to finalize and submit their FY 2014 funding applications, including LBO and other state programs. Providers do not need to seek RTA review or approval to submit, resubmit, or revise FY 2014 CTF applications to MDOT. However, transit providers are required to provide copies of their current FY 2014 CTF applications and any subsequent revisions to the Board.
- In the coming months, the RTA will be requesting briefings from providers on their FY 2014 CTF needs as submitted to MDOT so that RTA can increase its understanding on how each provider intends to use FY 2014 CTF funds.

Local Bus Operating Assistance:

MDOT provides LBO assistance to transit providers based on a percentage of eligible operating expenses following PA 51 requirements, including funding floor provisions. The amount provided to the RTA on behalf of the region will be based on the combined eligible operating expenses of the constituent providers and the eligible operating expenses of the RTA. If needed, MDOT will calculate RTA's floor as the sum of the floors of each individual provider, noting that neither the RTA itself (as a direct LBO recipient) nor the DTC have an Act 51 defined floor.

The following procedures will apply to LBO:

- Each provider shall continue to work directly with MDOT to refine and submit their FY 2014 operating budget. Providers do not need to seek RTA approval to submit or revise their respective FY 2014 operating budgets to MDOT. However, transit providers are required to provide copies of their current FY 2014 operating budgets, as submitted to MDOT, and any subsequent revisions to the RTA.
- The RTA will also be submitting a FY 2014 budget to MDOT for the eligible operating expenses it will incur (i.e., its administrative budget). The RTA will cover its FY 2014 administrative expenses first, by expending any unexpended funds carried over from the FY 2013 state grants made available to the RTA and any additional funds secured from federal, state, or private sources.. The RTA may use LBO assistance provided to the region as a contingency, should other revenues not be adequate. The amount of LBO used shall not exceed the difference between the RTA's FY 2014 budget and the amount of funds carried over from the FY 2013 state grants, plus a 10%

cushion. Prior to the use of LBO funds by the RTA, RTA staff shall provide a report to the board, providers, and MDOT on the amount needed, and of the efforts made to secure other funding.

- Once MDOT has determined the LBO amount to be distributed to the region, the RTA will establish a split of funds among providers in the region. The RTA commits that the split of FY 2014 LBO funds will be based on the proportion of each agencies eligible expenses that make up the total eligible expenses for the region, after any LBO funds required by RTA to complete its administrative budget are subtracted from the region's allocation. Individual agency floors (as they existed prior to RTA's formation) will not be used by RTA to allocate FY 2014 LBO funds allocated to the region.
- With the exception of any LBO funds that RTA may hold back for its administrative expenses and to enforce any coordination directives, all CTF funds will flow directly from MDOT to each provider throughout FY 2014. The RTA will instruct MDOT to ensure that project authorizations for CTF program and payments of FY 2014 CTF funds are made directly to each provider in the region.
- The RTA Act requires RTA to coordinate services between the providers in the region, and it may withhold up to five percent state LBO assistance in order to enforce "coordination directives." The RTA anticipates that it will adopt policies and procedures concerning coordination directives, sometime during this time period that will provide the RTA with the right to instruct MDOT to withhold up to five percent of LBO assistance to providers that are subject to a coordination directive, if necessary to affect the directive.
- If the RTA withholds any LBO funds from one or more providers in order to enforce compliance with one or more coordination directives issued by the RTA, the RTA will restore the withheld funds to the provider(s) once compliance with the coordination directive(s) is achieved.

Once the RTA successfully secures a source a regional funding, approved by the voters of the transit region, it will no longer fund its administrative budget from state LBO funds.

Federal Formula Funds and Associated State Match

Each provider shall continue to work directly with MDOT to submit and refine their projected federal capital match needs via the CTF application process without approval by the RTA.

The following procedures will apply to federal funds and the associated state match:

- Providers are currently working to submit their anticipated FY 2014 state matching fund needs to MDOT as part of their FY 2014 CTF applications. Providers shall

continue to work directly with MDOT. However, transit providers are required to provide copies of their current FY 2014 match plans, and any subsequent revisions, to the RTA. Final FY 2014 state match allocations will be determined by MDOT in the spring of FY2014.

- In the coming months, the RTA will be requesting briefings from each transit provider in the region on their anticipated use of FY 2014 federal funds and associated state match. The RTA wants to understand on how each provider will make use of FY 2014 federal funds before providers submit federal applications to the Federal Transit Administration (FTA). While the RTA may make suggestions or offer comments, the RTA will defer to the individual decisions made by transit providers on the use of FY 2014 federal funds and associated state matching funds.
- The RTA will work with FTA and MDOT to permit each transit provider in the region to make direct application to FTA for FY 2014 (and earlier) federal funds, and to MDOT for the associated state match for FY 2014 (and earlier).
- All FY 2014 federal formula funds apportioned to the Ann Arbor UZA will remain within the Ann Arbor UZA and will be programmed by AAATA. For AAATA, the RTA confers the right to receive and dispense or expend all federal funds in accord with the regional master transit plan and AAATA's priorities
- The federal funds apportioned to the Detroit Urbanized Area (UZA) will remain in the Detroit UZA and will be sub-allocated by the RTA to transit providers in the Detroit UZA in accord with either the sub-allocation formula adopted by SEMCOG in April, 2013, or by a new sub-allocation formula determined by the RTA. Once the sub-allocation is done by the RTA, the RTA confers to each individual transit agency within the Detroit UZA the right to receive and dispense or expend the federal funds allocated to it.
- Federal Discretionary Funds: For FY 2014, all providers in the transit region may continue to directly apply for, receive and dispense or expend federal discretionary funds without approval by the RTA. However, all providers are required to provide copies of their federal discretionary grant applications to the RTA, and to inform and provide copies of any subsequent changes to their applications and plans to expend the funds to the RTA.

Operations

All providers in the region shall continue to operate in accord with their respective operating policies and procedures (such as, but not limited to: personnel manuals and handbooks, procurement procedures and manuals, service standards, budget manuals, salary policies, etc.), subject to any coordination directives issued by the RTA. Existing local partnerships, such as funds a provider passes through to non-profit entities via

agreement or contract, remain under the sole jurisdiction of each individual transit provider and will not be subject to RTA review or discussion.

Local Funds

All local funds, including fare box, millage proceeds, general fund contributions, advertising and existing local contracts will remain under the sole jurisdiction of each individual transit provider.

Public Involvement and Outreach

Each transit provider shall continue to conduct the public involvement and outreach needed to meet its individual obligations to the public and under federal and state law and its respective policies. The RTA will have regional public involvement and outreach activities, such as the Citizen Advisory Committee required under state law, and each provider will be asked to participate in regional public outreach efforts as needed to make those efforts productive and meaningful to the public and the RTA.

ARTICLE III: From October 1, 2014 until September 30, 2015 **(FY 2015 State and Federal Funds)**

Planning

The regional master transit plan will govern transit development for the region and each provider in the region will abide by the plan starting in FY 2015.

Service Coordination

If necessary, the RTA will issue coordination directives to providers in the region. To enforce coordination directives, the RTA may instruct MDOT to withhold up to five percent of state LBO assistance to affected providers.

State Funding

All providers in the region shall submit their FY 2015 CTF applications to the RTA prior to submitting the applications to MDOT. The RTA will establish a deadline for submitting FY 2015 CTF applications to the RTA. For its own use only, the RTA will consolidate the eligible expenses, including the RTA's own eligible expenses into a single regional operations budget. However, once the regional budget and the individual providers' budgets have been approved by the RTA, each provider will continue to submit its budget directly to MDOT using the existing Public Transportation Management System (PTMS) process. The RTA will also submit its administrative budget via PTMS.

The method for allocating FY 2015 LBO funds will be the same as in FY 2014. Specifically, after a FY 2015 LBO allocation is made to the region by MDOT, the may use up to 1% of the region's LBO allocation as a contingency funding source for its administrative budget and dispense, or direct MDOT to dispense, the remaining funds to providers in proportion to the eligible expenses each submitted to the RTA. Prior to the use of LBO funds by the RTA, RTA staff shall provide by May 1, 2014, a report to the RTA board, providers, and MDOT on the amount needed, and of the efforts made to secure other funding.

During FY 2015, the RTA anticipates playing a substantial role in guiding transit services within the region, in particular in the three county area where DDOT, SMART, and the DTC operate. Therefore, while each provider's FY 2014 operating budget will be solely driven by individual agency priorities, the RTA will ensure that proposed FY 2015 operating budgets meet both local provider priorities as well as begin to achieve regional goals.

If the RTA withholds any LBO funds from one or more providers in order to enforce compliance with one or more compliance directives issued by the RTA, the RTA will restore the withheld funds to the provider(s) once compliance with the coordination directive(s) is achieved.

Once the RTA successfully secures a regional source of funding, approved by the voters in the transit region, it will no longer fund its administrative budget from state LBO funds.

Federal Formula Funds and Associated State Match

By FY 2015, RTA will have adopted procedures which will require that each transit provider's FY 2015 capital plans be reviewed in detail by the RTA from a regional perspective and in the context of the regional master transit plan prior to each provider making decisions regarding how they will make use of FY 2015 federal funds and state match.

The RTA anticipates playing a substantial role in the programming of federal capital funding and associated state match starting with FY 2015 funds. However, all FY 2015 federal formula funds apportioned to the Ann Arbor UZA will continue to be received and disbursed or expended within the Ann Arbor UZA, and the federal funds apportioned to the Detroit UZA will continue to be received and disbursed or expended within in the Detroit UZA.

Beginning in FY 2015, the RTA, through its Planning and Service Coordination Committee (PSCC), will work in collaboration with providers via the Provider Advisory Council (PAC) to identify specific uses of federal discretionary funds to achieve regional transit objectives consistent with the regional master transit plan. On behalf of the transit providers in the region, the RTA will apply for, receive and dispense or expend federal discretionary funds. However, the RTA may approve federal discretionary grant applications by individual

providers in the region so long as such applications are consistent with the regional master transit plan and the achievement of regional transit objectives. In the event that an application for federal discretionary funds is approved by the RTA for an individual provider, the RTA may confer upon that provider the right to apply for, receive and dispense or expend federal discretionary grant funds subject to oversight by the RTA.

Operations

Subject to RTA coordination directives and the regional master transit plan, each transit provider will continue to operate service in accord with their respective operating policies and procedures (such as but not limited to personnel manuals and handbooks, procurement procedures and manuals, service standards, budget manuals, salary policies, etc.)

The RTA may opt to review existing local partnerships, such as funds a provider passes through to non-profit entities via agreement or contract, and provide feedback or guidance regarding these partnerships, specifically to achieve regional goals or objectives and/or regional efficiencies. However, each provider will retain a significant amount of independence in determining their local partnerships.

Local Funds

All local funds, including fare box, millage proceeds, general fund contributions, advertising and existing local contracts will remain under the sole jurisdiction of each individual transit provider. A provider may be required to adjust their use of local funds to achieve RTA coordination directives, but how to achieve RTA coordination objectives will be up to the discretion of each provider.

Public Involvement and Outreach

Each transit provider will continue to conduct the public involvement and outreach needed to meet its individual obligations to the public and under federal and state law and each provider's respective policies. The RTA will have regional public involvement and outreach activities, such as the Citizen Advisory Committee required under state law, and each provider will be asked to participate in regional public outreach efforts as needed to make those efforts productive and meaningful to the public and the RTA.

AUTHORIZATION AND TERM OF AGREEMENT

This Agreement shall expire on September 30, 2015 unless renewed or otherwise extended. This Agreement may be amended by the RTA from time to time after consultation with providers.

As needed and/or upon request of the Provider Advisory Council (PAC), the RTA shall issue guidance documents under this Agreement, including but not limited to a Master Calendar for items requiring RTA approval which shall be provided no later than October 1, 2013.

On behalf of the Regional Transit Authority for Southeast Michigan


Paul Hillegonds, Chair, RTA Board of Directors

9/5/13
Date

On behalf of the Public Transportation Providers Advisory Council


Jim Fetzer, Chair, Public Transportation Providers
Advisory Council

8/21/13
Date

Appendix C

EXAMPLE OF ARTICLES OF INCORPORATION

ARTICLES OF INCORPORATION
BAY METROPOLITAN TRANSPORTATION AUTHORITY
[Amended July 9, 2008]

ARTICLE I

The name of the Corporation is Bay Metropolitan Transportation Authority, hereafter referred to as the “Authority”.

ARTICLE II

The incorporating subdivision of the Authority is the Bay County Metropolitan Transportation Authority Board of Directors.

ARTICLE III

The Authority is organized as a non-profit corporation on a non-stock basis.

ARTICLE IV

The Authority is to be financed through grants of money or property from federal or state governments, other revenues from federal or state governments, fees from riders, fees from contract users, financial contributions from federal, state, county, city or township governments, and other miscellaneous sources.

ARTICLE V

The registered office of the Authority shall be at 1510 N. Johnson Street, Bay City, MI 48708, and the registered agent at that address is the Bay Metropolitan Transportation Authority General Manager.

ARTICLE VI

The name and address of the incorporator is as follows: Bay County Metropolitan Transportation Authority, 1510 N. Johnson Street, Bay City, MI 48708

ARTICLE VII

The purposes for which the Authority is created are: To, pursuant to Act 196 of 1986, as amended, plan, promote, purchase, acquire, establish, own, lease, operate or cause to be operated, maintained, improved, enlarged, modernized, a public mass transit system within the County of Bay; provided, however, that such services may be extended outside the limits of the County as authorized by the Authority.

ARTICLE VIII

The Authority is hereby empowered to do anything authorized or permitted by Public Act 196 of 1986, as amended, and to do any other lawful act reasonably necessary, proper, suitable or convenient for the achievement or furtherance of the purposes above stated.

ARTICLE IX

[Sections 1, 2, 3, and 4 amended July 9, 2008]

1. The Authority shall be directed and governed by a nine [9] person Board of Directors, herein referred to as to “the Board”.
2. All nine [9] Board members shall be selected exclusively by the Chairman of the Bay County Board of Commissioners. Any vacancy occurring among the members of the Board, for any reason, shall be selected in the same manner. Board members should be appointed by August 16th of each year.
3. Board members must be at least eighteen [18] years of age and residents of the Authority’s service area. The service area shall be determined by the Authority’s Board of Directors pursuant to requirements of Public Act 196 of 1986, as amended.
4. The term of each Board member shall be for three [3] years.
5. The Board shall hold an initial meeting at a time and place selected and agreed to by the Board members for purposes of electing officers, adopting by-laws, and taking any other action the Board deems necessary. Thereafter, the Board shall hold at least an annual meeting at such place and time as shall be fixed by the Board thereafter, elect a chairperson, vice-chairperson and secretary. The Board shall have the authority to appoint a treasurer and recording secretary who need not be members of the Board. The Board shall transact such other business as may be necessary at its annual meeting and shall fix the time and place for regular meetings.
6. The Board shall keep a written or printed record of every meeting, which record shall be subject to the provisions of Public Act 276 of 1976, as amended [Open Meetings Act].
7. The Board shall supply a system of accounts to conform to the system required by law and shall provide for the auditing of said accounts at least once a year by a certified public accountant.
8. The Board shall employ a General Manager with such duties and authority as shall be determined by the Board.
9. The Board shall adopt rules, regulations, and/or policies governing the employees, property, and facilities under its jurisdiction.
10. The Board shall prepare or have prepared an annual report regarding the operation and financial condition of the Authority, which report shall be available to the public.
11. The Board shall adopt by-laws, policies and procedures it deems reasonably necessary or proper for the conduct of the business of the Board and for accomplishing the purposes for which the Authority is

12. The Bay Metropolitan Transportation Authority Board Secretary shall be charged with the responsibility of causing these Articles of Incorporation to be published, and the printed copies of the Articles of Incorporation to be filed as provided in Act 196 of 1986, as amended.

ARTICLE X

The Authority may be dissolved in accordance with the provisions of Act 196 of 1986, as amended.

ARTICLE XI

These Articles of Incorporation may be amended at any time by two-thirds [2/3] vote of the entire Board of Directors.

ARTICLE XII

The Authority shall become operative and the Articles of Incorporation effective on the 16th day of August 1992.

The foregoing Articles of Incorporation were adopted by an affirmative vote of a majority of the members serving on the Bay County Metropolitan Transportation Authority Board of Directors at their meeting duly held on June 17, 1992.

These Articles of Incorporation were amended by a two-thirds vote of the members of the Bay Metropolitan Transportation Authority Board of Directors at meetings held on the following dates:

1. August 19, 1992
2. August 21, 1996
3. December 30, 1996
4. January 20, 1999
5. October 17, 2001
6. June 6, 2002
7. July 9, 2008

Dr. Mary Ann Boettger
Secretary

Date Signed

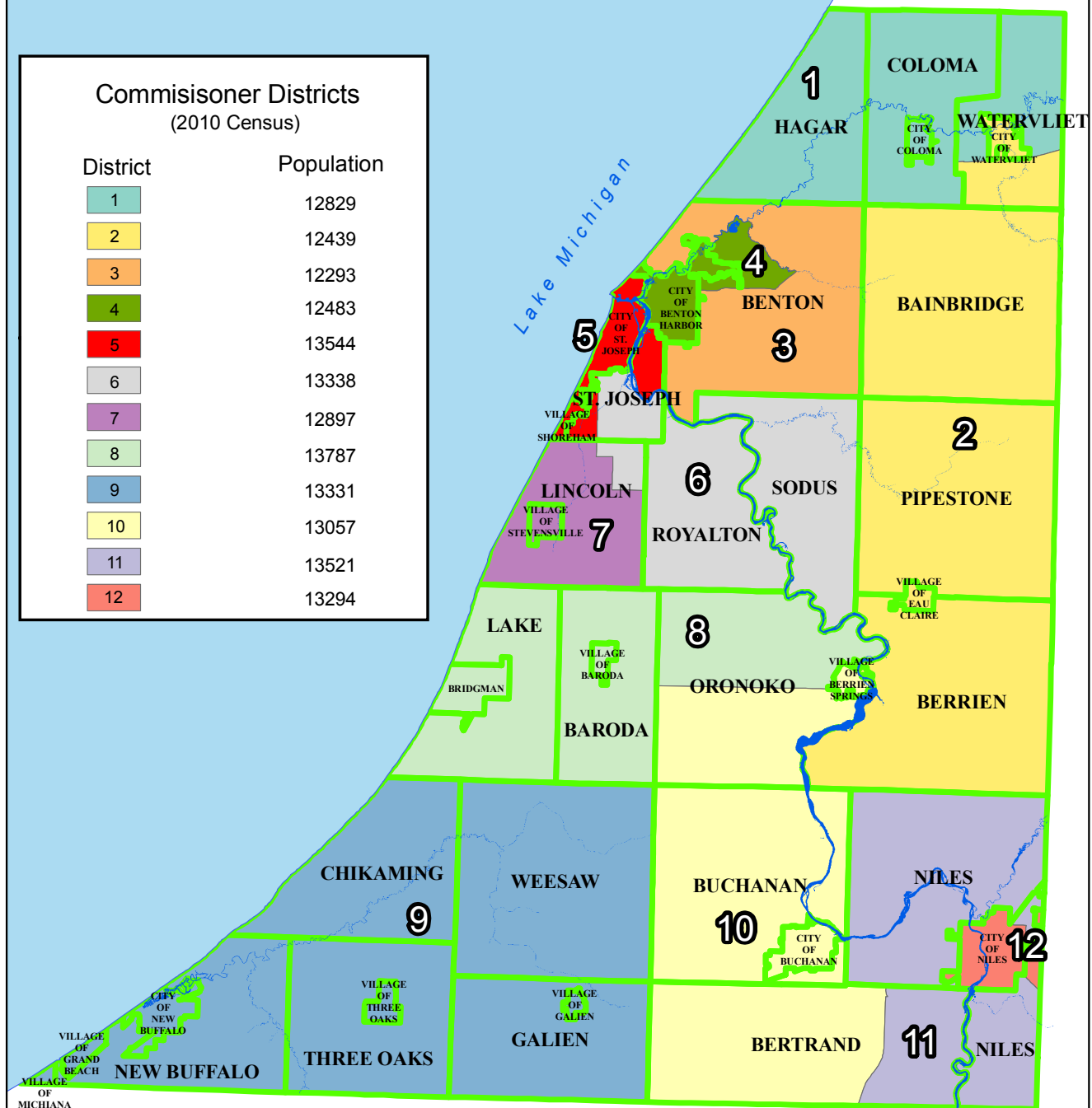
Appendix D

BERRIEN COUNTY COMMISSIONER DISTRICT MAP

Berrien County Commissioner District Map

Commisisoner Districts (2010 Census)

District	Population
1	12829
2	12439
3	12293
4	12483
5	13544
6	13338
7	12897
8	13787
9	13331
10	13057
11	13521
12	13294



Appendix E

EXAMPLE OF BOARD OF DIRECTORS NOMINATING PROCESS

JACKSON AREA TRANSPORTATION AUTHORITY NOMINATING COMMITTEE PROCESS

1. In October, a Nominating Committee is appointed by the President, subject to approval by the Board.
2. The Nominating Committee sets a timetable for receipt of nominations from the public and local governmental bodies.
3. An Indication of Interest form is created which includes the qualifications for office and states the vacancies to be filled. It also states which local governmental body(ies) will be involved in the advice and consent process and the deadline for submitting an Indication of Interest. The Indication of Interest form is a method of notifying the Nominating Committee of a particular person's interest in serving. It is not a prerequisite for consideration of a potential nominee by the Nominating Committee.
4. The President sends a letter to the appropriate constituent local governmental body(ies) and advises that there is a vacancy and that it may submit as many nominations as desired if there is interest in doing so. An Indication of Interest form is included and a deadline for response is given.
5. The JATA website publicizes which vacancies exist, the qualifications for the office, and invites eligible citizens to submit their Indication of Interest form to be appointed to the Board of Directors. The form on which to express an Indication of Interest is also posted on the website and a deadline for response is given.
6. A news release is sent to the Jackson Citizen Patriot and other area newspapers to inform them of which vacancies exist and invite people who are interested in being appointed to the Board of Directors to submit an Indication of Interest form. The deadline for the Indication of Interest and information on where to find the Indication of Interest form is given.

7. The Nominating Committee independently attempts to identify potential candidates and creates a list of names to be considered. Board members may also suggest names to the Nominating Committee.
8. After the expiration of the time for the receipt of the Indication of Interest, the Nominating Committee considers the applicants and the potential candidates which it independently identified and prepares a recommendation to the Board of directors.
9. At its January meeting, the Board of Directors will review those candidates for a vacancy which must be presented to a local governmental body for its advice and consent. Those candidates who receive 60% of the vote of the Board members will have their names submitted to the local governmental body for its advice and consent.
10. When the names are submitted to the local governmental body for its advice and consent, a transmittal letter will provide a deadline for a response from the local governmental body. The response from the local governmental body should be received in advance of the March meeting of the Board of Directors. The local governmental body should have at least two regular meetings at which to consider the matter between the time a name is submitted to it and the time by which action is requested. The regular meeting dates of the local governmental body should be consulted to ensure that the JATA Board has timely presented the nominee to the local governmental body.
11. At its March meeting, the Board of Directors votes on the nominees presented to a local governmental body and/or who were nominated by the local governmental body, and any nominations from the floor. Those nominees for a seat who receive 60% of the vote of the Board members present are deemed selected.
12. At its March meeting, the Board of Directors will review the Nominating Committee nominees for an at-large vacancy, and any nominations from the floor. Those nominees for an at-large seat to receive 60% of the vote the Board members present are deemed selected.
13. After the selection of the directors, President shall send a letter to the local governmental bodies involved and the newspapers advising them of the action of the Board in selecting directors. The decision of the Board of Directors will also be posted on the JATA website.

Appendix F

ROLES AND RESPONSIBILITIES FOR POSSIBLE BOARD SUBCOMMITTEES

GOVERNANCE SUBCOMMITTEE

POSSIBLE ROLES AND RESPONSIBILITIES

Headed by the Board Chair and consisting of the Chairs of the other two Governing Subcommittees and the Executive Director (as an ex officio, non-voting member), the Governance Subcommittee is responsible for the effective functioning of the BCTA Board of Directors and for the maintenance and development of the Board-Transit Director working relationship. In this capacity, it is accountable for:

- Coordinating the functioning of the BCTA Board and its two other Governing Committees and any ad hoc committees; keeping the Board Governing Mission updated; setting Board member performance standards; and monitoring Board member performance.
- Developing the agenda of the regular Board of Directors business meeting.
- Determining which of the Board Governing Committees should deal with a particular matter when it is not clear which Governing Committee has jurisdiction.
- Recommending revisions to the BCTA Bylaws in the interest of strong governing and management of BCTA affairs.
- Developing and keeping an updated profile of preferred Board member attributes and qualifications, and fashioning and executing strategies to promote the appointment of qualified candidates to fill Board vacancies by serving in an advisory capacity
- Developing and overseeing execution of a formal Board member capacity building program, including such elements as orientation of new members, continuing education and training, and a mentoring program pairing new Board members with senior Board members.

- Ensuring that the Transit Director position description is updated as necessary to reflect changing BCTA needs, priorities, and circumstances.
- Annually negotiating Transit Director performance targets and annually or semiannually evaluating the Transit Director progress in achieving these targets.

PLANNING AND DEVELOPMENT SUBCOMMITTEE

POSSIBLE ROLES AND RESPONSIBILITIES

The Planning and Development Subcommittee is accountable for developing and leading the Board's participation in all BCTA planning, including annual budget preparation, and for overseeing the development of BCTA's financial resources. In this capacity, it is accountable for:

- Reaching agreement with the Executive Director on the detailed design of BCTA's planning and budget development cycle, with special attention to the Board's role in planning, and on the annual planning calendar to ensure that the Board participates fully and proactively in the planning process.
- Overseeing preparation for periodic strategic planning work sessions to kick off the annual planning cycle.
- Overseeing follow-up to the strategic planning work session, including recommending to the full Board the strategic issues on which BCTA's strategic planning should focus and the assignment of strategic issues to the Board's governing committees.
- Recommending to the full Board the strategic issues on which BCTA's strategic planning should focus, and reviewing and recommending to the Board such critical planning products as updated values, vision, and mission statements, operational planning priorities, the annual budget, and other strategic and policy-level products that merit full Board attention.
- Ensuring, as part of the annual operational planning/budget preparation process, that all program plans include both financial and operational performance targets that the Performance Monitoring/External Relations Committee can use in monitoring the operational and financial performance of all of BCTA's programs and operating units.

PERFORMANCE MONITORING/EXTERNAL RELATIONS SUBCOMMITTEE

POSSIBLE ROLES AND RESPONSIBILITIES

The Performance Monitoring/External Relations Subcommittee is responsible for overseeing BCTA's operational and financial performance and maintenance of positive relationships with the general public and key stakeholders. In this capacity, it is accountable for:

- Reaching agreement with the Executive Director on the key elements of the operational and financial reporting process, including the content, format, and frequency of performance reports to the Board, and overseeing implementation of the process.
- Reviewing performance reports in committee meetings and reporting operational and financial performance to the full Board.
- Reviewing operational policies meriting Board attention (such as policies to govern BCTA's accounting system and practices), identifying the need for their revision, and recommending those policy revisions to the full Board.
- Overseeing the administration of customer satisfaction surveys, reviewing such surveys, and reporting survey results to the full Board as appropriate.
- Serving as the BCTA Audit Committee, including overseeing the process of selecting the external audit firm, reviewing external audit reports and overseeing corrective actions.
- Overseeing the development and implementation of strategies to foster a positive public image for BCTA, and for maintaining close, positive relationships between BCTA and its customers and its key external stakeholders.
- Overseeing the development and implementation of governmental relations policies and strategies.
- Recommending positions on legislative issues to the full Board.
- Coordinating opportunities for Board members to speak on behalf of BCTA in appropriate forums.
- Fashioning strategies and plans to enhance external communication.
- Fashioning strategies and plans to promote community involvement in BCTA's planning, service development, and operations.

Appendix G

JOB DESCRIPTIONS

TRANSIT DIRECTOR

Alternate Titles: Executive Director, Transit Administrator, General Manager

Job Description: Plans, directs, coordinates, and evaluates the activities of the transit system. Develops and administers the system budget; negotiates and secures funding from local contributing organizations; prepares grants; directs the purchase of capital equipment; and ensures the proper and efficient use of funds. Provides information, alternatives, and recommendations regarding policy and service issues to the Transit Board and implements Board decisions.

Education: Four year degree in Business, Accounting, or Transportation.

Common Qualifications/Skill Requirements:

- Significant experience in organization and administrative management. Previous experience in budget development, grant and proposal writing and administration, risk management, human resources, and transit operations.
- Significant previous experience in management, supervision, and project management.
- Experience creating budgets and familiar with government accounting systems.
- Familiar with transportation service delivery and planning.
- Human Resources experience.

Sample Specific Duties:

- Manage financial activities to support transit operations, quality, productivity, and goal attainment.
- Fiscal and management control including budget development and administration.
- Manage transit system procurements, cash, and investments.
- Develop policies and procedures in support of operations and administration.
- Ensure compliance with applicable local, state, and federal regulations.
- Manage and supervise multiple projects concurrently.
- Oversee human resource efforts, provide supervision, and leadership.
- Represent transit system to community and political constituents.

ADMINISTRATIVE ASSISTANT

Alternate Titles: Office Manager, Assistant to the Director

Job Description: Provides general administrative support for the director; performs a variety of administrative tasks.

Education: High School Diploma or equivalent.

Common Qualifications/Skill Requirements:

- Ability to communicate effectively in both the written and spoken form. Strong organizational skills.
- Stable work history with five years of administrative experience.
- Proficient writing, typing, and office skills.
- Strong knowledge of Microsoft Office software.
- Ability to interact professionally with internal and external clients.

Sample Specific Duties:

- Screen phone calls, visitors, and all incoming correspondence.
- Format and compose letters, reports, and memos.
- Respond to requests for information.
- Coordinate travel, arrange conferences, and meetings.
- Keep an organized collection of scheduled appointments.
- Arrange conferences, meetings.

PLANNING/MARKETING MANAGER

Job Description: Participates in policy development and implementation of service enhancement projects by conducting transit planning and service delivery studies that include the identification of issues, collection, analysis, and reporting of data, and the preparation and presentation of oral and written reports. Develops and supports marketing plans in order to maximize the services and programs of the transit agency. Designs and produces web-based marketing materials and print newsletters, flyers, and other materials. Researches, writes, and disseminates agency press releases, public service announcements, and feature stories. Cultivates and facilitates positive relationships with media and community groups.

Common Qualifications/Skill Requirements:

- Previous project management experience.
- Five years transit planning/operations experience.
- Customer service experience.
- Familiar with marketing concepts and transit fare programs.
- Working knowledge of presentation and graphics software packages.
- Conduct public outreach in conjunction with planners and managers.
- Develop new marketing concepts to encourage transit ridership.

Sample Specific Duties:

- Conduct analysis of local transit services.
- Identify opportunities for new services and service changes.
- Prepare planning documents for public and governmental review.
- Conduct community outreach forums for discussion of transit issues.

FINANCE CLERK/BOOKKEEPER

Alternative Titles: Transit Clerk, Finance Clerk, Payroll Clerk, Accounting Clerk/Assistant

Job Description: Performs routine bookkeeping functions such as entering data, posting financial information, updating account balances, and maintaining financial records. Counts, records, and deposits fare revenue.

Education: High School Diploma or equivalent, some college or accounting experience preferred.

Common Qualifications/Skill Requirements:

- Previous payroll processing or accounting background preferred.
- Accounting basics.
- Payroll and data entry processing.
- Proficient with Microsoft Office package including word processing and spreadsheets.
- Knowledge of generally accepted accounting principles.
- Ability to work in a fast paced multi-tasking environment.
- Ability to read, write, and speak English.
- Ability to communicate effectively on all levels.

Sample Specific Duties:

- Process payroll for all employees including garnishments, taxes, and relevant fare deductions on bi-weekly basis to ensure that all employees are paid accurately for their working hours.
- Complete daily and weekly reports for Operations/General Manager review to ensure that hours and payroll are within budgeted amounts for service provided.
- Maintain accurate fare accounting records and relevant payroll deductions for affected employees.
- Update and maintain vendor and supplier files.
- Ensure ample stores of necessary items including office supplies and computer equipment.

SAFETY AND TRAINING MANAGER

Job Description: Develops, coordinates, schedules, and conducts driver training programs. Insures that drivers meet and comply with all federal, state, and local health and safety regulations including Commercial Driver's License (CDL) requirements, and drug and alcohol testing and training. Responsible for accident investigation, accident review board activities, and retraining/refresher programs.

Education: High School Diploma or equivalent, certifications according to local contract requirements.

Common Qualifications/Skill Requirements:

- Previous passenger transportation in current project or similar environment required.
- Previous training and supervisory experience preferred, but not required.
- Excellent safety and service record.
- Knowledge of local training program and local operations
- Knowledge of project specific vehicles, components, and data/communications systems.
- Knowledge of state and federal regulations and corporate safety programs and policies.
- Familiar with Windows-based computer operating systems and Microsoft Office packages.

Sample Specific Duties:

- Manage new hire and veteran operator training programs to ensure that all operators receive the minimum initial training and that all employees receive required annual and on-going training.
- Provide and/or manage classroom and behind the wheel instruction according to corporate and client specifications in all aspects of vehicle operation in the course of passenger transportation, including defensive driving, service area familiarization, passenger loading, unloading and sacrament, proper manifest documentation, use of on-board equipment, accident and emergency procedures, dispatch and radio communications, and passenger sensitivity.
- Review all vehicular, passenger, and employee accidents/incidents for determination of cause and preventability. Identify potential trends to be addressed in future training efforts as well as ensuring that retraining and safety points are assessed according to company policy.

OPERATIONS MANAGER

Alternate Title: **Operations Supervisor**

Job Description: Performs a variety of duties relating to the supervision of transit operations including personnel, marketing, planning, safety, and scheduling. Oversees the drivers and dispatchers. May drive or dispatch as needed.

Education: High School Diploma or equivalent, preferred higher education in Business and Management arena.

Common Qualifications/Skill Requirements:

- Previous supervisory experience required, preferably in a transportation operations.
- Previous customer service experience preferred, but not necessary.
- Experience in developing and managing customer service initiatives preferred.
- Substantial experience in the operation phases of a transit organization.
- Must have the ability to recruit and develop staff to deliver reliable service product.
- Must work effectively with fellow employees and have strong leadership characteristics.
- Must have good time management skills and ability to manage multiple tasks concurrently.
- Requires flexible hours, including long days and weekends.
- Must have a working vehicle to travel within service area.
- Strong customer service skills.
- Knowledge of windows-based computer operating systems and functional knowledge of word processing, spreadsheet, and presentation software.
- Knowledge of service area and system parameters.
- Strong organizational skills in filing and file maintenance.
- Ability to read, write, and speak English.

Sample Specific Duties:

- Maintains or manages attendance records for vehicle operators and back-up drivers; ensures that the attendance policy is enforced and monitored daily.
- Develops staff and operator schedules fairly, in consideration of seniority, according to client demands/requirements and adhering to budget.
- Responsible for positive employee morale and quality customer service.
- Prepares, verifies, and reviews staff schedules and work records for payroll purposes.

- Assigns work duties to qualified employees to ensure adequate coverage of all supervisory shifts and assigned routes.
- Ensures that individual customer/passenger concerns are responded to in a manner that includes investigation and follow-up as concerns apply to specific employees.
- Assists in the recruitment, selection, and training of new operator and staff employees.
- Conducts performance reviews for all operations staff at least annually. Monitors vehicle operator performance by spot-checking routes and times of various routes.

ADMINISTRATIVE/CLERICAL SUPPORT

Alternative Job Titles: Clerk

Job Description: Performs routine clerical functions such as entering data using a personal computer and maintaining computer and paper records.

Education: High School Diploma or equivalent.

Common Qualifications/Skill Requirements:

- Strong customer service background.
- Strong organizational skills.
- Ability to speak, read, and write the English language.
- Proficiency in Microsoft Office.

Sample Specific Duties:

STREET SUPERVISOR

Job Description: Oversees the drivers while they are in service. Serves as a front-line supervisor. May drive or dispatch as needed.

Education: High School Diploma or equivalent, certifications according to local contract requirements.

Common Qualifications/Skill Requirements:

- Previous passenger transportation in current project or similar environment required.
- Previous training and/or field supervision experience preferred, but not required.
- Excellent safety and service record.
- Knowledge of local training program and local operations.
- Familiarization with service area.
- Knowledge of client and service performance requirements.
- Ability to manage emergency situations.
- Knowledge of project specific vehicles, components, and data/communications systems.
- Knowledge of state and federal regulations and corporate safety programs and policies.

Sample Specific Duties:

- Conduct site checks and road observations according to client and local policy. Document findings accordingly and provide necessary reports to project staff.
- Monitor street operations for on-time performance and schedule and route adherence.
- Accompany operators to medical facilities as required after accident or injury; ensure proper administration of post-accident drug and alcohol testing.
- Identify potential rerouting required as a result of traffic, construction, or accident situations.
- Assist operators with service or passenger problems.

DISPATCHER/SCHEDULER

Job Description: Dispatches the system's vehicles and provides a communication link to agency drivers. Duties may include using two-way radio, telephone, and/or computer to transmit assignments and compile daily operating statistics. Provides direction to and maintains two-way communications with all operators while monitoring system performance and making scheduling adjustments where necessary to maximize on-time performance, minimizes customer wait times for on-call or will-call services, minimizes service disruptions as a result of vehicle/operator availability, and/or emergency situations. Plans, schedules, oversees, and keeps records for demand-response transit services. Administers Americans with Disabilities Act (ADA)-related transit requests; takes calls from customers and schedules ride appointments, and requests for return trips; and assigns drivers according to trip manifests.

Common Qualifications/Skill Requirements:

- Previous data entry, dispatch, customer service, supervisory and/or operating experience desired but not required.
- Strong customer service skills.
- Data entry experience and general knowledge of windows-based computer operating system and Microsoft Office package.
- Knowledge of service area.
- Ability to read, write and speak clearly the English language – basic knowledge of Spanish may be required depending on contract location and requirements.
- Able to use multi-line phone system and handle multiple tasks concurrently.
- Ability to supervise.
- Previous data entry, dispatch, customer service, supervisory, and/or operating experience desired, but not required.
- Strong customer service skills.
- Data entry experience and general knowledge of windows-based computer operating system and Microsoft Office package.
- Knowledge of service area.
- Ability to read, write, and speak clearly the English language – basic knowledge of Spanish may be required depending on contract location and requirements.
- Able to use multi-line phone system and handle multiple tasks concurrently.

Sample Specific Duties:

- Assign work, vehicles, and onboard equipment to operators and maintain check-out logs

- Assign stand-by or extra board operators in the event of operator absences, increased service volumes, or in order to minimize service disruptions as a result of traffic, vehicle malfunctions, operator problems, and/or emergency situations.
- Monitor operators and trip status, making adjustments and reassignments as necessary to ensure on-time performance.
- Reschedule trips as necessary in the event of vehicle malfunction, traffic, or emergency situations.
- Open and/or close facility depending upon work shift.
- Answer passenger calls collecting all necessary trip information for the permissible time period.
- Complete data entry of passenger file information and for specific trip requests, negotiating requested times where necessary or appropriate.
- Maintain up-to-date passenger records in customer database, making all necessary changes in status, client contact information, fare/rider type, or other important field entries.

FLEET MAINTENANCE MANAGER

Job Description: Plans, organizes, assigns, supervises, and evaluates the work of fleet technicians/mechanics and other workers engaged in the maintenance and repair of fleet vehicles. Provides oversight and direction for the maintenance function.

Education: Degree or satisfactory completion of automotive trade school or college.

Common Qualifications/Skill Requirements:

- Substantial experience in the maintenance phases of a transit organization.
- Previous related work experience or equivalent combination of education and experience.
- Valid driver's license.
- Ability to communicate clearly, accurately, and effectively both verbally and written.
- ASE Certification.

Sample Specific Duties:

- Coordinates and directs the repair and maintenance of company operated equipment and vehicles.
- Determines work procedures, prepares work schedules, and expedites workflow accordingly.
- Trains and/or assists maintenance staff on vehicle repairs to ensure maximum fleet availability and maximum cost benefit.
- Ensures all Occupational Safety and Health Administration (OSHA) rules and regulations are at all times adhered to, including the "Employee's Right to Know" program.

MAINTENANCE CLERK

Job Description: Performs routine clerical functions such as entering data using a personal computer and maintaining computer and paper records.

Education: High School Diploma or equivalent, two year degree or technical proficiency preferred.

Common Qualifications/Skill Requirements:

- Accounting/inventory management experience.
- Familiar with preventive maintenance programs.
- Familiar with Microsoft Office package.

Sample Specific Duties:

- Maintain records of parts purchases and uses.
- Maintain vehicle maintenance files.
- Prepare regular mileage reports.

MECHANIC

Job Description: Performs repair and preventive maintenance activities for the fleet. Evaluates, troubleshoots, analyzes, and tests a wide variety of transit vehicle systems to determine the nature and extent of defects; replaces, repairs, and overhauls heavy equipment systems such as engines, transmissions, front and rear end assemblies, power steering, braking mechanisms, electronic engine and equipment systems and controls, and hydraulic systems.

Education: High School Diploma or equivalent, trade school certification, or equivalent in both light and heavy duty automotive repairs.

Common Qualifications/Skill Requirements:

- Ability to perform major and minor repairs to engines, transmission, brake, and hydraulic systems.
- Ability to use computerized scanning equipment to aid in the diagnosis.
- Ability to prioritize work.
- Decision making and problem solving capabilities.
- Ability to work independently.

Sample Specific Duties:

- Ensures that all vehicle condition reports are accurate and properly addressed.
- Maintains all maintenance records, i.e., work orders, in an “inspection ready” status at all times; ensures repair orders are neat and accurate.
- Tracks all repairs in progress to ensure that the timely and correct repair of vehicles for return to operations; knows the maintenance status of all assigned vehicles at all times.
- Perform regular preventive maintenance on company vehicles.
- Work with operations staff on resolving road calls.

MECHANIC ASSISTANT

Job Description: Performs repair and maintenance activities and assists mechanics in performing more complex activities related to the maintenance and repair of gasoline or diesel-powered automotive or heavy equipment.

Education: High School Diploma or equivalent, some technical or trade school preferred.

Common Qualifications/Skill Requirements:

- Previous experience in minor duty vehicle repairs.
- Familiarity with preventive maintenance programs and procedures.
- Ability to prioritize work.

Sample Specific Duties:

- Pick-up and/or delivery of parts as needed.
- Check status of parts on order and parts needed for inventory.
- Monitor, review, and assist with work in progress; ensure quality of repairs and that proper inspections have been performed.

MAINTENANCE UTILITY WORKER

Job Description: Cleans, fuels, and parks vehicles. Performs other non-vehicle maintenance duties as needed to assist in the upkeep of the facility and grounds.

Education: High School Diploma or equivalent.

Common Qualifications/Skill Requirements:

- General knowledge of OSHA and Environmental Protection Agency (EPA) regulations related to shop and office conditions.
- Must possess a valid driver's license for the local fleet type.
- Ability to lift 50 pounds unassisted.
- General mechanical and/or carpentry skills.
- Ability to read and write and understand basic directions.
- Ability to work without direct supervision.

Sample Specific Duties:

- All vehicles cleaned, fueled and fluids topped, ready for service at various times of day.
- Fuel logs maintained accurately and up-to-date for each vehicle and type of fuel/fluid.
- Vehicle interiors and exteriors cleaned according to standard.
- Provide assistance as necessary to shop staff in keeping parts inventories accounted for as well as in procurement of necessary parts for fleet and facility maintenance.
- Lot maintained and kept clean, including removal of trash and debris, sweeping, snow shoveling, grass cutting and weeding, and trimming when necessary.
- Perform minor vehicle repairs such as light bulb replacement, adding fluids, etc. requiring small articulate hand movements.

BUS DRIVER – COMMERCIAL DRIVER’S LICENSE

Job Description: Drives bus, motor coach, or paratransit vehicles, including regular route operations, paratransit, charters, and/or private carriage. Communicates with and assists passengers. May collect fares, tickets, or passes. In paratransit operation, may assist riders in a wheelchair up or down two steps where a ramp is not available.

Education: High School Diploma or equivalent. Training to successfully test for a Commercial Driver’s License.

Common Qualifications/Skill Requirements:

- Previous professional driving experience preferred, but not required.
- Previous customer service experience, experience working with persons with disabilities, and/or senior citizen groups preferred, but not required.
- Safe driving record and clean criminal history.
- Valid Commercial Driver’s License with passenger endorsement.
- Ability to read, write and speak the English language clearly.
- Ability to navigate the service area through the use of maps and/or on-board directional equipment.
- Ability to communicate effectively with passengers, passenger representatives, and system staff.
- Ability to remain calm in emergency situations and ensure the safety of all passengers and employees.
- Knowledge of service area.

Sample Specific Duties:

- Successfully perform scheduled manifest by picking up all clients on time and delivering them to their destinations safely and within a reasonable time frame.
- Ensure the safety of all passengers by use of appropriate on-board restraints.
- Communicate effectively with dispatch or central office personnel via two way radio.
- Document thoroughly the course of the day including odometer readings, times, and passenger information.

BUS DRIVER – NO CDL REQUIRED

Job Description: Drives bus, motor coach or paratransit vehicles, including regular route operations, paratransit, charters, and/or private carriage. Communicates with and assists passengers. May collect fares, tickets, or passes. In paratransit operation, may assist riders in a wheelchair up or down two steps where a ramp is not available.

Education: High School Diploma or equivalent.

Common Qualifications/Skill Requirements:

- Previous professional driving experience preferred, but not required.
- Previous customer service experience, experience working with persons with disabilities, and/or senior citizen groups preferred, but not required.
- Safe driving record and clean criminal history.
- Ability to read, write, and speak the English language clearly.
- Ability to navigate the service area through the use of maps and/or on-board directional equipment.
- Ability to communicate effectively with passengers, passenger representatives, and system staff.
- Ability to remain calm in emergency situations and ensure the safety of all passengers and employees.
- Knowledge of service area.

Sample Specific Duties:

- Successfully perform scheduled manifest by picking up all clients on time and delivering them to their destinations safely and within a reasonable time frame.
- Ensure the safety of all passengers by use of appropriate on-board restraints.
- Communicate effectively with dispatch or central office personnel via two way radio.
- Document thoroughly the course of the day including odometer readings, times, and passenger information.

Appendix H

SYSTEM OPERATING EXPENSES BY FISCAL YEAR

Niles Dial-A-Ride FY 2011 Operating Expenses

Expenses	Dial-A-Ride Operations	Dial-A-Ride Maintenance	Dial-A-Ride General Admin	Total
Operators Salaries and Wages	\$253,870			\$253,870
Other Salaries and Wages		\$56,570	\$42,564	\$99,134
Dispatchers' Salaries and Wages	\$2,886			\$2,886
Fringe Benefits	\$4,266	\$4,033	\$3,030	\$11,329
Advertising Fees			\$613	\$613
Audit Cost			\$1,197	\$1,197
Other Services (i.e. sanitation)	\$1,317	\$632	\$164	\$2,113
Fuels and Lubricants	\$46,730	\$414		\$47,144
Tires and Tubes				\$0
Materials and Supplies	\$486	\$29,094	\$1,595	\$31,175
Utilities		\$5,241	\$11,731	\$16,972
Liability Insurance	\$13,481		\$2,394	\$15,875
Other Insurance		\$2,744		\$2,744
Taxes and Fees			\$100	\$100
Travel, Meetings, and Training	\$329		\$3,418	\$3,747
Association Dues and Subscriptions				\$0
Other Misc. Expenses (i.e. drug testing)			\$166	\$166
Operating Leases and Rentals				\$0
Total	\$323,365	\$98,728	\$66,972	\$489,065

Source: City of Niles - Report to MDOT.

Niles Dial-A-Ride FY 2012 Operating Expenses

Expenses	Dial-A-Ride Operations	Dial-A-Ride Maintenance	Dial-A-Ride General Admin	Total
Operators Salaries and Wages	\$98,499			\$98,499
Other Salaries and Wages		\$54,992	\$48,399	\$103,391
Dispatchers' Salaries and Wages	\$43,493			\$43,493
Fringe Benefits	\$25,510	\$17,785	\$15,234	\$58,529
Advertising Fees			\$985	\$985

Expenses	Dial-A-Ride Operations	Dial-A-Ride Maintenance	Dial-A-Ride General Admin	Total
Audit Cost				\$0
Other Services (i.e. sanitation)	\$717			\$717
Fuels and Lubricants	\$32,962	\$210		\$33,172
Tires and Tubes				\$0
Materials and Supplies	\$1,031	\$39,029	\$1,286	\$41,346
Utilities		\$3,258	\$11,684	\$14,942
Liability Insurance	\$3,670		\$1,570	\$5,240
Other Insurance		\$597		\$597
Taxes and Fees			\$100	\$100
Travel, Meetings, and Training	\$803	\$225	\$2,299	\$3,327
Association Dues and Subscriptions			\$2,125	\$2,125
Other Misc. Expenses (i.e. drug testing)			\$20	\$20
Operating Leases and Rentals				\$0
Total	\$206,685	\$116,096	\$83,702	\$406,483
Source: City of Niles - Report to MDOT.				

Niles Dial-A-Ride FY 2013 Operating Expenses

Expenses	Dial-A-Ride Operations	Dial-A-Ride Maintenance	Dial-A-Ride General Admin	Total
Operators Salaries and Wages	\$100,783			\$100,783
Other Salaries and Wages		\$57,370	\$44,464	\$101,834
Dispatchers' Salaries and Wages	\$51,918			\$51,918
Fringe Benefits	\$24,842	\$17,093	\$15,830	\$57,765
Pensions	\$1,765	\$2,407	\$2,636	\$6,808
Advertising Fees			\$1,088	\$1,088
Audit Cost			\$1,750	\$1,750
Other Services (i.e. sanitation)	\$1,139	\$680		\$1,819
Fuels and Lubricants	\$31,816	\$1,563		\$33,379
Tires and Tubes				\$0
Materials and Supplies	\$335	\$43,860	\$925	\$45,120
Utilities	\$46	\$3,358	\$11,871	\$15,275
Liability Insurance	\$3,900		\$2,842	\$6,742
Other Insurance		\$611		\$611
Taxes and Fees	\$60		\$100	\$160
Travel, Meetings, and Training	\$387	\$286	\$1,780	\$2,453
Association Dues and Subscriptions			\$2,225	\$2,225
Other Misc. Expenses (i.e. drug testing)			\$764	\$764
Operating Leases and Rentals				\$0
Total	\$216,991	\$127,228	\$86,275	\$430,494
Source: City of Niles - Report to MDOT.				

Buchanan Dial-A-Ride FY 2011 Operating Expenses - Nonurban City

Expenses	Operations	Maintenance	General Admin	Total
Operators Salaries and Wages	\$50,476			\$50,476
Other Salaries and Wages	\$1,435	\$8,250	\$3,226	\$12,911
Dispatchers' Salaries and Wages	\$8,317			\$8,317
Fringe Benefits	\$10,181	\$1,614	\$546	\$12,341
Audit Cost			\$5,351	\$5,351
Other Services (i.e. background checks, repairs)	\$49	\$222	\$17,448	\$17,719
Fuels and Lubricants	\$17,335			\$17,335
Tires and Tubes	\$955			\$955
Materials and Supplies	\$2,671	\$709	\$507	\$3,887
Utilities			\$4,452	\$4,452
Liability Insurance	\$6,686			\$6,686
Other Insurance			\$508	\$508
Travel, Meetings, and Training	\$253	\$173	\$1,343	\$1,769
Total	\$98,358	\$10,968	\$33,381	\$142,707
Source: TMI - Report to MDOT.				

Buchanan Dial-A-Ride FY 2011 Operating Expenses - Small Urban

Expenses	Dial-A-Ride Operations	Dial-A-Ride Maintenance	Dial-A-Ride General Admin	Total
Operators Salaries and Wages	\$18,622			\$18,622
Other Salaries and Wages	\$530	\$3,043	\$1,190	\$4,763
Dispatchers' Salaries and Wages	\$3,068			\$3,068
Fringe Benefits	\$3,756	\$596	\$201	\$4,553
Audit Cost			\$1,974	\$1,974
Other Services (i.e. background checks, repairs)	\$18	\$82	\$6,437	\$6,537
Fuels and Lubricants	\$6,395			\$6,395
Tires and Tubes	\$353			\$353
Materials and Supplies	\$985	\$262	\$187	\$1,434
Utilities			\$1,642	\$1,642
Liability Insurance	\$2,466			\$2,466
Other Insurance			\$187	
Travel, Meetings, and Training	\$94	\$64	\$496	\$654
Total	\$36,287	\$4,047	\$12,314	\$52,648
Source: TMI - Report to MDOT.				

Combined Total	\$134,645	\$15,015	\$45,695	\$195,355
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Buchanan Dial-A-Ride FY 2012 Operating Expenses - Nonurban City

Expenses	Operations	Maintenance	General Admin	Total
Operators Salaries and Wages	\$54,346			\$54,346
Other Salaries and Wages	\$1,544	\$8,900	\$3,473	\$13,917
Dispatchers' Salaries and Wages	\$8,956			\$8,956
Fringe Benefits	\$13,139	\$2,013	\$705	\$15,857
Audit Cost			\$5,552	\$5,552
Other Services (i.e. background checks, repairs)	\$24	\$420	\$19,115	\$19,559
Fuels and Lubricants	\$20,432			\$20,432
Tires and Tubes	\$836			\$836
Materials and Supplies	\$2,292	\$710	\$590	\$3,592
Utilities			\$5,036	\$5,036
Liability Insurance	\$7,833			\$7,833
Other Insurance			\$519	\$519
Association Dues & Subscriptions			\$563	\$563
Travel, Meetings, and Training	\$575	\$780	\$1,741	\$3,096
Total	\$109,977	\$12,823	\$37,294	\$160,094
Source: TMI - Report to MDOT.				

Buchanan Dial-A-Ride FY 2012 Operating Expenses - Small Urban

Expenses	Dial-A-Ride Operations	Dial-A-Ride Maintenance	Dial-A-Ride General Admin	Total
Operators Salaries and Wages	\$13,190			\$13,190
Other Salaries and Wages	\$374	\$2,160	\$843	\$3,377
Dispatchers' Salaries and Wages	\$2,174			\$2,174
Fringe Benefits	\$3,189	\$489	\$171	\$3,849
Audit Cost			\$1,348	\$1,348
Other Services (i.e. background checks, repairs)	\$6	\$102	\$4,639	\$4,747
Fuels and Lubricants	\$4,959			\$4,959
Tires and Tubes	\$203			\$203
Materials and Supplies	\$556	\$172	\$143	\$871
Utilities			\$1,222	\$1,222
Liability Insurance	\$1,901			\$1,901
Other Insurance			\$126	\$126
Association Dues & Subscriptions			\$137	\$137
Travel, Meetings, and Training	\$140	\$189	\$422	\$751
Total	\$26,692	\$3,112	\$9,051	\$38,855
Source: TMI - Report to MDOT.				
Combined Total	\$136,669	\$15,935	\$46,345	\$198,949

Buchanan Dial-A-Ride FY 2013 Operating Expenses - Nonurban City

Expenses	Operations	Maintenance	General Admin	Total
Operators Salaries and Wages	\$53,879			\$53,879
Other Salaries and Wages	\$2,019	\$9,475	\$3,920	\$15,414
Dispatchers' Salaries and Wages	\$10,076			\$10,076
Fringe Benefits	\$13,392	\$2,119	\$776	\$16,287
Audit Cost			\$5,588	\$5,588
Other Services (i.e. background checks, repairs)	\$57	\$542	\$21,842	\$22,441
Fuels and Lubricants	\$17,264			\$17,264
Tires and Tubes	\$423			\$423
Materials and Supplies	\$2,101	\$457	\$642	\$3,200
Utilities			\$4,093	\$4,093
Liability Insurance	\$4,140			\$4,140
Other Insurance			\$515	\$515
Association Dues & Subscriptions			\$551	\$551
Travel, Meetings, and Training	\$205	\$832	\$1,291	\$2,328
Total	\$103,556	\$13,425	\$39,218	\$156,199
Source: TMI - Report to MDOT.				

Buchanan Dial-A-Ride FY 2013 Operating Expenses - Small Urban

Expenses	Dial-A-Ride Operations	Dial-A-Ride Maintenance	Dial-A-Ride General Admin	Total
Operators Salaries and Wages	\$14,582			\$14,582
Other Salaries and Wages	\$547	\$2,565	\$1,061	\$4,173
Dispatchers' Salaries and Wages	\$2,727			\$2,727
Fringe Benefits	\$3,625	\$574	\$210	\$4,409
Audit Cost			\$1,512	\$1,512
Other Services (i.e. background checks, repairs)	\$16	\$146	\$5,912	\$6,074
Fuels and Lubricants	\$4,673			\$4,673
Tires and Tubes	\$115			\$115
Materials and Supplies	\$568	\$124	\$174	\$866
Utilities			\$1,108	\$1,108
Liability Insurance	\$1,120			\$1,120
Other Insurance			\$140	
Association Dues & Subscriptions			\$149	
Travel, Meetings, and Training	\$56	\$225	\$350	\$631
Total	\$28,029	\$3,634	\$10,616	\$42,279
Source: TMI - Report to MDOT.				
Combined Total	\$131,585	\$17,059	\$49,834	\$198,478

Berrien Bus FY 2011 Operating Expenses

Expenses	Operations	Maintenance	General Admin	Total
Operators Salaries and Wages	\$335,803			\$335,803
Other Salaries and Wages	\$9,521	\$54,854	\$21,481	\$85,856
Dispatchers' Salaries and Wages	\$55,325			\$55,325
Fringe Benefits	\$75,334	\$11,599	\$3,955	\$90,888
Advertising Fees			\$197	\$197
Audit Cost			\$8,000	\$8,000
Other Services*	\$274	\$9,627	\$101,556	\$111,457
Fuels and Lubricants	\$42,538			\$42,538
Tires and Tubes	\$5,781			\$5,781
Major Purchases (Power Wash, Chairs)		\$4,337	\$496	\$4,833
Other Materials and Supplies	\$36,595	\$5,879	\$2,605	\$45,079
Utilities			\$22,064	\$22,064
Liability Insurance	\$36,520			\$36,520
Other Insurance			\$4,748	\$4,748
Travel, Meetings, and Training	\$175		\$3,518	\$3,693
Association Dues and Subscriptions			\$1,238	\$1,238
Operating Leases and Rentals	\$5,436			\$5,436
Total	\$603,302	\$86,296	\$169,858	\$859,456
* Includes Admin fees, AC/Heat, and Garage Door per report. Source: MI - Report to MDOT.				

Berrien Bus FY 2012 Operating Expenses

Expenses	Operations	Maintenance	General Admin	Total
Operators Salaries and Wages	\$340,063			\$340,063
Other Salaries and Wages	\$9,658	\$55,537	\$21,742	\$86,937
Dispatchers' Salaries and Wages	\$56,032			\$56,032
Fringe Benefits	\$87,496	\$13,421	\$4,689	\$105,606
Advertising Fees			\$412	\$412
Audit Cost			\$8,000	\$8,000
Other Services	\$176	\$27,073	\$89,773	\$117,022
Fuels and Lubricants	\$185,679			\$185,679
Tires and Tubes	\$7,619			\$7,619
Major Purchases (Power Wash, Chairs)				\$0
Other Materials and Supplies	\$29,503	\$6,813	\$1,811	\$38,127
Utilities	\$296		\$17,278	\$17,574
Liability Insurance	\$38,232			\$38,232
Other Insurance			\$5,099	\$5,099
Purchased Transportation Service	\$91,795			\$91,795
Travel, Meetings, and Training	\$330	\$331	\$2,861	\$3,522
Association Dues and Subscriptions			\$992	\$992
Operating Leases and Rentals	\$5,653			\$5,653
Total	\$852,532	\$103,175	\$152,657	\$1,108,364
Source: MI - Report to MDOT.				

Berrien Bus FY 2013 Operating Expenses

Expenses	Operations	Maintenance	General Admin	Total
Operators Salaries and Wages	\$344,900			\$344,900
Other Salaries and Wages	\$12,739	\$60,344	\$24,897	\$97,980
Dispatchers' Salaries and Wages	\$63,965			\$63,965
Fringe Benefits	\$95,973	\$14,716	\$5,456	\$116,145
Advertising Fees			\$518	\$518
Audit Cost			\$8,000	\$8,000
Other Services	\$834	\$12,133	\$102,897	\$115,864
Fuels and Lubricants	\$181,637			\$181,637
Tires and Tubes	\$10,412			\$10,412
Major Purchases (Power Wash, Chairs)				\$0
Other Materials and Supplies	\$20,769	\$10,596	\$1,989	\$33,354
Utilities	\$139		\$18,991	\$19,130
Liability Insurance	\$40,169			\$40,169
Purchased Transportation Service	\$142,087			\$142,087
Other Insurance			\$5,311	\$5,311
Travel, Meetings, and Training	\$238	\$35	\$3,771	\$4,044
Association Dues and Subscriptions			\$1,192	\$1,192
Operating Leases and Rentals	\$5,879			\$5,879
Total	\$919,741	\$97,824	\$173,022	\$1,190,587
Source: MI - Report to MDOT.				

TCATA FY 2011 Operating Expenses - Small Urban

Expenses	Line Haul Operations	Dial-A-Ride Operations	Line Haul Maintenance	Dial-A-Ride Maintenance	Line Haul General Admin	Dial-A-Ride General Admin	Total
Operators Salaries and Wages	\$51,147	\$446,439					\$497,586
Other Salaries and Wages	\$1,752	\$14,076	\$8,151	\$55,383	\$15,528	\$81,833	\$176,723
Dispatchers' Salaries and Wages		\$145,137					\$145,137
Fringe Benefits	\$33,720	\$270,805	\$4,495	\$30,595	\$6,340	\$33,534	\$379,489
Advertising Fees					\$95	\$501	\$596
Audit Cost					\$778	\$7,870	\$8,648
Other Services (i.e. sanitation)	\$455	\$3,697	\$24,276	\$164,753	\$12,551	\$62,764	\$268,496
Fuels and Lubricants	\$27,868	\$208,600					\$236,468
Tires and Tubes	\$2,248	\$18,081					\$20,329
Materials and Supplies			\$1,119	\$7,626	\$1,821	\$9,636	\$20,202
Utilities	\$2,720	\$21,913	\$2,373	\$16,109	\$510	\$2,685	\$46,310
Liability Insurance	\$4,260	\$34,423					\$38,683
Other Insurance					\$1,212	\$6,350	\$7,562
Taxes and Fees					\$112	\$595	\$707
Travel, Meetings, and Training	\$89	\$723	\$69	\$469	\$1,406	\$7,391	\$10,147
Association Dues and Subscriptions					\$499	\$2,667	\$3,166
Other Misc. Expenses (i.e. drug testing)	\$96	\$763			\$578	\$3,053	\$4,490
Operating Leases and Rentals	\$417	\$3,344	\$353	\$2,407			\$6,521
Total	\$124,772	\$1,168,001	\$40,836	\$277,342	\$41,430	\$218,879	\$1,871,260
Source: TCATA- Report to MDOT.							

TCATA FY 2011 Operating Expenses - Job Access

Expenses	Line Haul Operations	Dial-A-Ride Operations	Line Haul Maintenance	Dial-A-Ride Maintenance	Line Haul General Admin	Dial-A-Ride General Admin	Total
Operators Salaries and Wages	\$46,802	\$58,919					\$105,721
Other Salaries and Wages	\$1,477	\$1,863	\$6,010	\$7,646	\$9,448	\$12,240	\$38,684
Dispatchers' Salaries and Wages	\$12,283	\$14,206					\$26,489
Fringe Benefits	\$28,403	\$35,982	\$3,282	\$4,198	\$3,827	\$4,906	\$80,598
Advertising Fees					\$58	\$77	\$135
Other Services (i.e. sanitation)	\$362	\$460	\$17,897	\$22,971	\$8,054	\$10,172	\$59,916
Fuels and Lubricants	\$22,164	\$27,952					\$50,116
Tires and Tubes	\$1,885	\$2,385					\$4,270
Materials and Supplies			\$807	\$1,043	\$1,093	\$1,409	\$4,352
Utilities	\$2,284	\$2,846	\$1,743	\$2,251	\$307	\$406	\$9,837
Liability Insurance	\$3,564	\$4,359					\$7,923
Other Insurance					\$766	\$963	\$1,729
Taxes and Fees					\$66	\$83	\$149
Travel, Meetings, and Training	\$71	\$92	\$52	\$67	\$850	\$1,133	\$2,265
Association Dues and Subscriptions					\$293	\$365	\$658
Other Misc. Expenses (i.e. drug testing)	\$82	\$108			\$351	\$451	\$992
Operating Leases and Rentals	\$351	\$450	\$259	\$328			\$1,388
Total	\$119,728	\$149,622	\$30,050	\$38,504	\$25,113	\$32,205	\$395,222
Source: TCATA- Report to MDOT.							

Combined Total	\$244,500	\$1,317,623	\$70,886	\$315,846	\$66,543	\$251,084	\$2,266,482
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TCATA FY 2012 Operating Expenses - Small Urban

Expenses	Line Haul Operations	Dial-A-Ride Operations	Line Haul Maintenance	Dial-A-Ride Maintenance	Line Haul General Admin	Dial-A-Ride General Admin	Total
Operators Salaries and Wages	\$51,017	\$459,839					\$510,856
Other Salaries and Wages	\$2,789	\$22,449	\$8,352	\$57,079	\$15,559	\$83,144	\$189,372
Dispatchers' Salaries and Wages		\$125,610					\$125,610
Fringe Benefits	\$37,421	\$304,076	\$5,611	\$38,411	\$7,145	\$41,122	\$433,786
Advertising Fees					\$603	\$3,224	\$3,827
Audit Cost					\$918	\$4,956	\$5,874
Other Services (i.e. sanitation)	\$657	\$5,254	\$22,842	\$156,154	\$4,808	\$651	\$190,366
Fuels and Lubricants	\$28,689	\$215,666					\$244,355
Tires and Tubes	\$2,035	\$16,323					\$18,358
Materials and Supplies			\$630	\$4,319	\$1,640	\$8,746	\$15,335
Utilities	\$2,452	\$19,762	\$2,049	\$13,994	\$822	\$4,373	\$43,452
Liability Insurance	\$5,567	\$45,002					\$50,569
Other Insurance					\$1,023	\$5,484	\$6,507
Taxes and Fees					\$17	\$93	\$110
Travel, Meetings, and Training	\$214	\$1,717	\$88	\$597	\$917	\$4,883	\$8,416
Association Dues and Subscriptions	\$69	\$547			\$481	\$2,588	\$3,685
Other Misc. Expenses (i.e. drug testing)	\$103	\$827			\$260	\$1,387	\$2,577
Operating Leases and Rentals	\$518	\$4,172	\$132	\$898	\$37	\$198	\$5,955
Total	\$131,531	\$1,221,244	\$39,704	\$271,452	\$34,230	\$160,849	\$1,859,010
Source: TCATA- Report to MDOT.							

TCATA FY 2012 Operating Expenses - Job Access

Expenses	Line Haul Operations	Dial-A-Ride Operations	Line Haul Maintenance	Dial-A-Ride Maintenance	Line Haul General Admin	Dial-A-Ride General Admin	Total
Operators Salaries and Wages	\$42,689	\$51,611					\$94,300
Other Salaries and Wages	\$2,329	\$2,950	\$6,026	\$7,639	\$9,076	\$11,508	\$39,528
Dispatchers' Salaries and Wages	\$11,556	\$14,654					\$26,210
Fringe Benefits	\$31,131	\$36,777	\$4,022	\$5,095	\$4,170	\$2,342	\$83,537
Advertising Fees					\$353	\$442	\$795
Audit Costs					\$518	\$646	\$1,164
Other Services (i.e. sanitation)	\$560	\$716	\$16,498	\$20,829	\$5,105	\$6,490	\$50,198
Fuels and Lubricants	\$22,411	\$28,264					\$50,675
Tires and Tubes	\$1,707	\$2,196					\$3,903
Materials and Supplies			\$452	\$567	\$972	\$1,218	\$3,209
Utilities	\$2,041	\$2,572	\$1,488	\$1,875	\$488	\$619	\$9,083
Liability Insurance	\$4,566	\$5,773					\$10,339
Other Insurance					\$589	\$745	\$1,334
Taxes and Fees					\$10	\$13	\$23
Travel, Meetings, and Training	\$181	\$230	\$66	\$84	\$541	\$689	\$1,791
Association Dues and Subscriptions	\$62	\$75			\$272	\$344	\$753
Other Misc. Expenses (i.e. drug testing)	\$87	\$110			\$151	\$193	\$541
Operating Leases and Rentals	\$431	\$542	\$97	\$123	\$22	\$28	\$1,243
Total	\$119,751	\$146,470	\$28,649	\$36,212	\$22,267	\$25,277	\$378,626
Source: TCATA- Report to MDOT.							

Combined Total	\$251,282	\$1,367,714	\$68,353	\$307,664	\$56,497	\$186,126	\$2,237,636
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TCATA FY 2013 Operating Expenses - Small Urban

Expenses	Line Haul Operations	Dial-A-Ride Operations	Line Haul Maintenance	Dial-A-Ride Maintenance	Line Haul General Admin	Dial-A-Ride General Admin	Total
Operators Salaries and Wages	\$39,796	\$440,268					\$480,064
Other Salaries and Wages	\$2,861	\$23,018	\$7,851	\$53,599	\$14,486	\$77,324	\$179,139
Dispatchers' Salaries and Wages		\$127,858					\$127,858
Fringe Benefits	\$35,152	\$282,461	\$5,207	\$35,617	\$11,992	\$63,967	\$434,396
Advertising Fees					\$717	\$3,794	\$4,511
Audit Cost					\$1,175	\$6,290	\$7,465
Other Services (i.e. sanitation)	\$623	\$4,988	\$26,443	\$180,353	\$2,213	\$11,921	\$226,541
Fuels and Lubricants	\$27,535	\$211,686					\$239,221
Tires and Tubes	\$2,262	\$18,059					\$20,321
Materials and Supplies	\$92	\$734	\$1,272	\$8,640	\$1,796	\$9,551	\$22,085
Utilities	\$1,446	\$11,637	\$2,360	\$16,158	\$488	\$2,615	\$34,704
Liability Insurance	\$6,798	\$54,698					\$61,496
Other Insurance					\$909	\$4,865	\$5,774
Taxes and Fees					\$134	\$717	\$851
Travel, Meetings, and Training	\$355	\$2,843	\$44	\$296	\$849	\$4,534	\$8,921
Association Dues and Subscriptions					\$97	\$516	\$613
Other Misc. Expenses (i.e. drug testing)	\$128	\$1,030			\$364	\$1,942	\$3,464
Operating Leases and Rentals	\$522	\$4,192	\$66	\$457	\$36	\$192	\$5,465
Total	\$117,570	\$1,183,472	\$43,243	\$295,120	\$35,256	\$188,228	\$1,862,889
Source: TCATA- Report to MDOT.							

TCATA FY 2013 Operating Expenses - Job Access

Expenses	Line Haul Operations	Dial-A-Ride Operations	Line Haul Maintenance	Dial-A-Ride Maintenance	Line Haul General Admin	Dial-A-Ride General Admin	Total
Operators Salaries and Wages	\$55,668	\$59,186					\$114,854
Other Salaries and Wages	\$2,411	\$3,015	\$5,728	\$7,172	\$8,552	\$10,699	\$37,577
Dispatchers' Salaries and Wages		\$13,637					\$13,637
Fringe Benefits	\$29,699	\$37,265	\$3,764	\$4,726	\$7,096	\$8,881	\$91,431
Audit Costs					\$688	\$856	\$1,544
Advertising Fees					\$443	\$545	\$988
Other Services (i.e. sanitation)	\$535	\$672	\$19,408	\$24,220	\$1,166	\$1,664	\$47,665
Fuels and Lubricants	\$22,205	\$27,750					\$49,955
Tires and Tubes	\$1,932	\$2,497					\$4,429
Materials and Supplies	\$79	\$99	\$963	\$1,175	\$1,081	\$1,342	\$4,739
Utilities	\$1,221	\$1,520	\$1,704	\$2,130	\$283	\$354	\$7,212
Liability Insurance	\$5,719	\$7,158					\$12,877
Other Insurance					\$533	\$665	\$1,198
Taxes and Fees					\$77	\$96	\$173
Travel, Meetings, and Training	\$304	\$384	\$32	\$41	\$501	\$628	\$1,890
Association Dues and Subscriptions					\$58	\$74	\$132
Other Misc. Expenses (i.e. drug testing)	\$110	\$136			\$214	\$269	\$729
Operating Leases and Rentals	\$442	\$553	\$46	\$59	\$21	\$27	\$1,148
Total	\$120,325	\$153,872	\$31,645	\$39,523	\$20,713	\$26,100	\$392,178
Source: TCATA- Report to MDOT.							

Combined Total	\$237,895	\$1,337,344	\$74,888	\$334,643	\$55,969	\$214,328	\$2,255,067
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Appendix I

LETTER OF UNDERSTANDING (BERRIEN COUNTY/TCATA)



County of Berrien
Community Development

BERRIEN COUNTY ADMINISTRATION CENTER
701 MAIN STREET
ST. JOSEPH, MICHIGAN
49085-1392

DENNIS SCHUH, TRANSPORTATION COORDINATOR
TELEPHONE: (269) 983-7111 EXT. 8262
FAX: 269-982-8611
E-MAIL: dschuh@berriencounty.org

June 16, 2011

Bill Purvis, Director:

The purpose of this letter is to set forth in writing the understanding between the County of Berrien, as operators of Berrien County's transit system (BerrienBus), and the Twin Cities Area Transportation Authority (TCATA), as operators of TCATA Dial-A-Ride, concerning the cooperative distribution of Federal Transit Administration (FTA) formula funds to the two transit agencies operating in the Benton Harbor Urbanized Area. This letter of understanding shall be renewed on an annual basis unless the County of Berrien and TCATA mutually agree to a longer term.

This understanding, based on discussions between the two systems, is to use a local urban-area apportionment methodology parallel to that used in the annual apportionment of funds from the FTA to the State of Michigan for the urban transit agency formula program. The FTA provides formula funding to urban transit agencies based upon decennial census population and population density numbers. These decennial numbers are combined with an annual factor to determine funding to the State of Michigan for each urbanized area. By this understanding, the County of Berrien and TCATA will similarly utilize the population of their respective transit system service areas to determine the share of funding available to each entity. Funding which is available, but which is based on population not served by one of the two transit agencies will be split equally between the two until such time as service area boundaries change so that the populations within any service area change by 5% or more, at which time the corrected population figures will be used and the percentage adjusted accordingly. On an annual basis either system may decline their share of funding for the unserved area and allow the other system to use 100% of the available funding for that area.

Using this methodology and 2010 Census figures, the distribution formula for FY 2011 is set out as follows:

- Total Benton Harbor Urbanized Area Population – 60,386 persons
- TCATA Urban Service Area Population – 31,819 persons = 52.69% of available funds
- Berrien County's transit system Service Area Population -- 0 persons = 0% of available funds
- Unserved Urban Population – 28,567 persons = 47.30% of available funds

For FY 2011 Berrien County declines their share of funding for the unserved portion of the urbanized area. This permits TCATA to obtain 100% of the available funding for the Benton Harbor Urbanized Area for FY 2011.

Sincerely,

Dave Pagel, Chairman
Board of Commissioners
Berrien County

Date

Twin Cities Area
Transportation Authority

Date

M. Louise Stine, County Clerk

Date

Appendix J

MOU AND AGREEMENT (CITY OF NILES)

MEMORANDUM OF UNDERSTANDING

Between

THE MICHIANA AREA COUNCIL OF GOVERNMENTS

THE SOUTHWEST MICHIGAN PLANNING COMMISSION

THE CITY OF NILES and

THE SOUTH BEND PUBLIC TRANSPORTATION CORPORATION

This Memorandum of Understanding is an agreement between the Michiana Area Council of Governments (MACOG) and the Southwest Michigan Planning Commission (SWMPC) on behalf of the Designated Recipients and public mass transit operators within their respective geographical areas. This Memorandum is intended to define the basic process by which federal funds made available from the U.S. Department of Transportation, Federal Transit Administration (FTA), under Section 5307 of Title 49, United States Code Annotated, Chapter 53, as amended, are to be divided within the South Bend Urbanized Area.

This Memorandum shall serve as the basis of ordinances or resolutions, enacted by the policy boards of the respective agencies, to implement the capital programs funded by Section 5307.

The process is defined as follows:

1. After publication of the South Bend Urbanized Area annual apportionments in the Federal Register, MACOG will prepare the worksheet to split the apportionment between bus and rail, using the NTD FY data referenced in the Federal Register. This document will be distributed to the City of Niles and the South Bend Public Transportation Corporation within 15 days of the Federal Register publication.
2. Representatives of the City of Niles and the SBPTC will meet prior to submitting capital projects to MACOG or SWMPC. At this meeting, or subsequent meetings, the City of Niles and SBPTC will discuss the capital needs of each transit system and will cooperatively come to a sharing agreement regarding the level of funds that each will receive for the next four fiscal years.
3. The annual funding agreement shall be documented and submitted to the SWMPC and MACOG by the City of Niles, Michigan and the SBPTC within 30 days of receipt of the bus/rail apportionment split.
4. The General Manager of the SBPTC and the Representative of the City of Niles will provide annual letters to MACOG and the SWMPC certifying agreement by each party regarding the funding allocation by dollar amount to be attributed to both transit systems. These letters must be submitted no later than 30 days of receipt of the bus/rail apportionment split. If no agreement can be made between the two transit systems, then the decision will be made in a joint meeting

between MACOG and the SWMPC. If a joint meeting is required, the Executive Director's of the respective MPO's will meet to develop an equitable agreement. The MPO Executive Director's will include the FTA designated recipients in the meeting. The agreement brokered between the MPO's will be reviewed and presented for approval at their next respective Policy Board meeting.

5. When projects are submitted for inclusion in the Transportation Improvement Program (TIP), MACOG will be responsible for prioritizing all projects in accordance with the documented funding agreement in Indiana and the SWMPC will be responsible for prioritizing all projects in accordance with the documented funding agreement in Michigan. The SWMPC and MACOG assure that the funding split agreed to will be financially constrained. The MPOs further agree that the annual apportionment will be estimated over four years using the last Federal Register apportionment figures for the South Bend Urbanized Area. Adjustments to the increases or decreases in the actual FY apportionments shall be made as part of the annual update to the funding agreement.
6. Paper copies of draft Section 5307 grant applications will be provided by the City of Niles and the SBPTC to their respective MPO prior to their submission to FTA. Paper copies of final Section 5307 grant applications will be provided to the respective MPO when the grant is executed. The SWMPC and MACOG will be responsible for reviewing and verifying that the programmed projects and associated costs are consistent with the current TIP and STIP. Each MPO will send a letter of concurrence to the FTA representative and to their corresponding state representative with copies to each transit system and MPO. The MPOs agree to perform the concurrence review in a timely manner, and shall report to the FTA and each other its concurrence or lack thereof within seven (7) working days of receipt of the draft grant application.
7. In the event of a change in Designated Recipients, the passage of new authorizing legislation for the FTA Section 5307 Program, or significant revisions to FTA Circular 9030.1D, discussion will be held between the SWMPC and MACOG to review the process outlined in this Memorandum.
8. This Memorandum of Understanding shall be reviewed every three years or when a signatory requests a written change.

CITY OF NILES

By: _____
Kelly Getman-Dissette, Transportation Coordinator

Date: _____

SOUTH BEND PUBLIC TRANSPORTATION CORP.

By: _____
Maurice Pearl, General Manager

Date: _____

SOUTHWEST MICHIGAN PLANNING COMMISSION

By: _____
K. John Egelhaaf, Executive Director

Date: _____

MICHIANA AREA COUNCIL OF GOVERNMENTS

By: _____
Sandra Seanor, Executive Director

Date: _____



South Bend Public Transportation Corporation

July 30, 2012

Ms. Sandra Seanor
Executive Director
MACOG
227 W. Jefferson, Room 1120
South Bend, IN 46601

Dear Sandi:

Through this letter, the South Bend Public Transportation Corporation (TRANSPO) and the City of Niles confirm our acceptance of the funding allocations established by MACOG for bus/rail split of Federal Transit Monies (5307) for FY 2012.

We have also agreed upon the following the funding allocation between Niles and TRANSPO.

	TRANSPO	Niles
Formula	\$2 646,498	\$178,000

During 2012 TRANSPO completed an application to allow 5307 formula monies to be used for offset the cost of fuel. TRANSPO was approved to use up to \$176,000.00 for this program. We have agreed upon the following the funding allocation between Niles and TRANSPO.

	TRANSPO	Niles
Fuel	\$ 144,000	\$32,000

Please do not hesitate to contact us if you have any questions.

Sincerely,

Maurice Pearl
TRANSPO

Kelly Getman-Dissette
Niles-Dial- A- Ride

(574) 232-9901 • FAX (574) 239-2309 • 1401 S. Lafayette Blvd. • P.O. Box 1437 • South Bend, IN 46624

Appendix K

EMPLOYEE WAGE AND BENEFIT INTERACTIVE TOOL

TCRP PROJECT F-12 EMPLOYEE WAGE AND BENEFIT INTERACTIVE TOOL WAGE COMPARISON

Job/Employee Category	Low Wage	High Wage	Average Wage
<i>(move cursor over position for description)</i>			
Administration (Annual Wages - Full Time)			
Director	\$23,115	\$74,772	\$50,723
Administrative Assistant	\$20,295	\$42,624	\$28,208
Transit Planner	\$30,813	\$56,490	\$39,103
Finance Clerk	\$24,568	\$38,516	\$29,976
Marketing Specialist	\$17,502	\$55,463	\$36,482
Computer Operator	\$20,542	\$50,204	\$35,373
Safety and Training Manager	\$20,295	\$42,727	\$32,684
Rideshare Coordinator	\$27,238	\$36,318	\$31,778
Trainer	\$17,646	\$55,463	\$33,031
Operations (Hourly Wages)			
Administrative Support	\$9.24	\$15.78	\$11.88
Operations Supervisor	\$13.82	\$22.27	\$16.98
Street Supervisor	\$12.02	\$19.00	\$14.53
Scheduler/Call Taker	\$8.22	\$14.84	\$11.46
Dispatcher	\$7.45	\$19.00	\$11.53
Maintenance Manager	\$9.09	\$26.17	\$17.00
Maintenance Clerk	\$7.24	\$14.38	\$10.81
Mechanic	\$10.27	\$17.97	\$13.72
Mechanic Assistant	\$8.22	\$15.21	\$10.38
Utility Worker	\$6.01	\$13.94	\$10.06
Driver - with Commercial Drivers Licence (CDL)	\$7.96	\$16.36	\$10.97
Driver - no Commercial Drivers Licence (CDL)	\$7.96	\$10.15	\$9.01

Inputs

State: **MI**
 Urbanized Area: **No**
 Number of Employees: **25-49 Employees**
 Employees in Union: **No**

Today's Date: **9/27/2012**

Appendix L

TRANSIT SYSTEM BROCHURES AND SCHEDULES

SCHEDULES**Benton Harbor/St. Joseph**

Daily: from **Berrien Springs** at 6:15am, 7:30am, 10:00am, 1:00pm.
Returns from Benton Harbor at 8:30am, 10:45am, 1:45pm, 4:15pm.
Returns from St. Joseph at 8:45am, 10:30am, 1:30pm, 4:30pm.

Niles

Daily: from **Berrien Springs** at 6:00am, 11:15am, 2:30pm.
Returns to Berrien Springs at 8:45am, 12:30pm, 4:15pm.
Returns from Niles to Benton Harbor/St. Joseph at 8:45am, 12:30pm.
Returns to Niles from Benton Harbor/St. Joseph at 10:45am,

Berrien Springs & Vicinity of Berrien Springs

Daily: 8:00am to 4:45pm

Watervliet/Coloma

Daily: 9:15am, 3:00pm
Returns from Benton Harbor/St. Joseph at 1:30pm.

BERRIENbus

471-1100 or 1-800-654-1827
 Office hours are 5:00am to 5:00pm
 Monday through Friday

BERRIENbus**BERRIENbus SERVICE:**

Berrienbus is a curb-to-curb, advanced reservation, shared ride transportation service for residents of Berrien County featuring half-fare price for all elderly and persons with disabilities.

- Buses can come 10 minutes early or 10 minutes later than the scheduled pick up time.
- Buses can only wait 2 minutes at each pick up.
- Passengers are responsible for canceling a ride one hour before the bus is in route or the passenger will be charged a no-show fare. This fare must be paid before the passengers next ride.
- A no-show fare is the cost of the scheduled ride.



If you feel you are being denied participation in or being denied benefits of the transit services provided by Berrien County, or otherwise being discriminated against because of your race, color, or national origin you may contact our office at:

Berrien County Administration Center
 Community Development Department
 Attn: Transportation Coordinator/Tide VI Coordinator
 701 Main Street
 St. Joseph, MI 49085

**Managed by:**

Transportation Management, Inc.
 P.O. Box 186
 Berrien Springs, MI 49103
 Telephone #: 471-1100 or
 1-800-654-1827

Berrienbus is sponsored by Berrien County through the Berrien County Board of Commissioners. Support for its operation comes from fares and the State of Michigan.

... a curb-to-curb
 advanced reservation,
 share ride
 transportation system for
 Berrien County

residents, with specially
 reduced fares for the
 elderly and the disabled.



Who can use it?

Any resident of Berrien County is eligible to use Berrienbus service. This includes both individuals and groups of any age. Persons 60 and over and persons who are physically or mentally disabled are eligible to use the service for one half fare.

Where does it go?

Berrienbus service covers the entire county. With 24 hour advance reservations, either individuals or groups may use the bus for shopping trips, visiting friends and relatives, medical, dental and other appointments, plus many other uses. Berrienbus coordinates its service with the dial-a-ride systems operation in the Twin Cities area, Niles, and Buchanan.

What are the buses like?

Berrienbus operates 24 buses, with capacities ranging from 12 to 28 passengers. All buses are equipped with lifts for the disabled.

What are the hours?

Berrienbus service is available from 5am to 5pm, Monday through Friday.



Where to call:

Local 471-1100
Toll-free 1-800-654-1827

Weather Closings:

Find weather closing information @:

AM 940 - WGMV FM 94.9 - The COAST
AM 1400 - WSJM FM 103.7 - WZBL
FM 107.1 - WIRX FM 98.3 - WCSY/COSY
FM 97.5 - WYTZ WSBT TV/22 NEWS



What does it cost?

Fares are as follows:

- Rides within a five mile radius...\$2.50
- Rides beyond a five mile radius...\$5.00
- Age 0 to 2 years...Free
- Persons 60 and older, physically or mentally disabled...50% discount

Group rates may vary.

RULES ON THE BUS:

- NO Eating.
- NO Smoking.
- NO Drinking.
- Drivers **cannot** make change.
- *If a passenger needs to stop and make change, the cost is \$1.00. Wait fee is \$1.00 for making change.*
- Number of bags allowed per passenger is 3 bags. Each additional bag is \$1.00.
- No shirt, no shoes, no service.
- Children must be three (3) years of age to ride unaccompanied.
- No standing/walking is permitted while vehicle is moving. All passengers should be seated facing forward at all times.
- No soliciting of any kind, including photographing which is prohibited without permission from Berrien County Public Transit Management.
- Possession or consumption of alcohol or illegal substances is prohibited.
- Disruptive behavior of any nature may result in refusal of transportation.
- Carrying a weapon of any kind is prohibited.
- Lift vehicles are equipped to transport wheelchair passengers not exceeding weight of 600 pounds (combined weight of wheelchair, person, & carry-ons).

PICK-UP POINTS

Benton Harbor	
Aldi's Mall	Social Secur Health De
Lowes	Mercy Cent
Meijer	Secretary of Sta
Target	Michigan Wor
Greyhound	Home Def
Wal Mart	DHS (Dept. of Human Service
Riverwood	Plaza (Rite A. Vincent Pla
St. Joseph	
Courthouse	Secretary of Sta
Martins	Lakeland Hospit
Hardings	Greenwood Profession
Cedarwood	Buildin
Niles	
Antrak	Martin's Supermark
Dial-a-ride	South County Buildir
Lakeland	Wal-Ma
Watervliet	
Hardings	Corner of M-140 & Red Arro
	Hw
Coloma	
Hardings	Senior Cent
Call for more information on the following cities:	
Baroda	Sawye
Buchanan	Sodu:
New Buffalo	Three Oak:
...or anywhere else in Berrien County.	
Each Berrienbus trip must be reserved 24 hours in advance. Only 1 day can be scheduled at a time.	

As a recipient of federal financial assistance, Buchanan Dial-A-Ride provides public transit services without regard to race, color, or national origin, in compliance with Title VI of the Civil Rights Act of 1964. For more information on Buchanan Dial-A-Ride's Title VI obligations, or if you believe you have been discriminated against for any of the above reasons, you may contact our Title VI Coordinator at 310 Main Street, St. Joseph, MI 49085, or at (269) 983-8990.

Things you need to know:

- Buses can come 10 minutes early or 10 minutes later than the scheduled pickup time.
- Buses can only wait 2 minutes at each pickup.
- A passenger that missed the dial-a-ride is considered a no-show. A no-show must be paid on the next scheduled ride.

****No-show fare is the cost of the scheduled no-show ride**

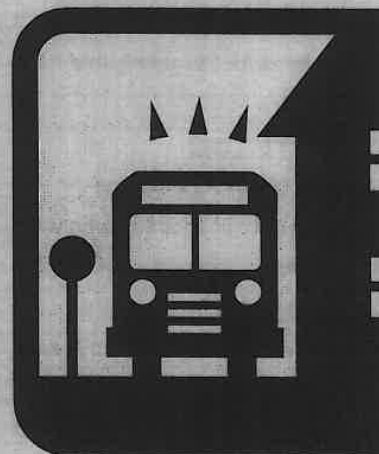
Weather Closings

Find weather closing information at:
AM 940, WGMY FM 94.9,
The Coast AM 1400, WSJM
FM 103.7, WZBL, FM 107.1,
WIRX, FM 98.3, WCSY
FM 97.5, WYTZ
TV/Channel
WNDU 16 WSBT 22 News

Buchanan

Dial-A-Ride

269-697-0600



Buchanan

Life is better here.

BUCHANAN

DIAL-A-RIDE

Our mission is to provide safe, dependable transportation for as many people as possible, at a reasonable cost. This is a shared-ride transportation system for Buchanan residents, with specially reduced fares for the elderly and the disabled.

Where does it go?

Buchanan Dial-A-Ride service covers the Buchanan area along with trips to Niles.

Who can use it?

Any resident of the Buchanan area is eligible to use the dial-a-ride service. This includes all individuals of any age. Persons 60 and over and persons who are physically or mentally disabled are eligible to use the service for half the regular fare.

What Does It Cost?

In City, including up to 1 mile outside of City limits:

Regular: \$1.50

Senior/Disabled*: \$0.75

Beyond 1 mile outside of City limits:

Regular: \$4.00

Senior/Disabled*: \$2.00

*Senior: age 60 or older; Medicare card holder: half fare

Children under 1 year of age: free

Children under 12, accompanied by an adult: half fare

Student attending school activity: \$1.00

Where to call to schedule a

ride? Local: 697-0600

Toll Free: 1-800-654-1827

Monday thru Friday

Buchanan to Niles (Shuttle)

7:00 am, 11:30 am, 2:00 pm, 4:30pm

Niles to Buchanan (Shuttle)

7:30 am, 12:00 pm, 2:30 pm, 4:45 pm

Saturday

Buchanan to Niles (Shuttle)

11:00 am, 2:00 pm, 3:00 pm

Niles to Buchanan (Shuttle)

9:00 am, 11:30 am, 2:30 pm

Closed on Sundays

What are the hours?

- Monday through Friday:

7:00 am to 5:30 pm

- Saturday: 9:00 am to 3:00 pm

- Sundays and Holidays: Closed

OTHER IMPORTANT INFORMATION

CANCELLATION/NO-SHOW POLICY

If you no longer need a scheduled ride, please cancel your reservation by calling DART Dispatch at 269.684.5150. Drivers will wait up to 3 minutes for a passenger. If a passenger fails to show for a scheduled ride, a no-show infraction is issued and a \$1 fee is assessed at the time of the next ride. Riders are verbally notified of each no-show infraction.

STANDING ORDER TRIPS

If you will be traveling on the same day(s) of the week, at the same time(s), to the same location(s), you may be eligible for a standing order trip. Please contact the DART office for more information.

ACCESSIBILITY

All DART buses are wheelchair accessible with wheelchair lifts to bring passengers aboard. Passengers in wheelchairs must use the straps provided to secure their chairs. Caregivers may ride for free. If you require DART information in an alternate format, contact the DART office.

BIKE RACKS

Some of the DART buses now have bike racks that hold up to 2 bicycles. Riders should expect to load their own bikes to the rack in the front of the bus. Drivers will not load bikes, but can offer instruction on how to do so. Please inform Dispatch that you will be bringing your bike when you call to schedule your ride.

COMMENTS / SUGGESTIONS

Your comments and suggestions are always welcome. Contact the main office at by phone or in writing to offer your concerns, comments, and suggestions.

HOURS AND FARES

DART Operating Hours

Demand Response

Monday - Friday 7:00 a.m. - 5:00 p.m.
Saturday 10:00 a.m. - 3:00 p.m.

Fixed Route

Monday - Friday 10:00 a.m. - 5:00 p.m.

The route bus may deviate upon request to access destinations along the route that are not officially designated stops. Riders wishing to use this service must call in advance. For more information, contact the DART office.

DART Fares

Exact change is required. Drivers and office staff **cannot** make change.

Demand Response

Within City Limits:

\$3.00/\$1.50 reduced fare*

To, from, or within Township:

\$4.00/\$2.00 reduced fare*

Fixed Route

\$2.00/\$1 reduced fare*

*Reduced fare cards are available for persons receiving supplemental Social Security income or Medicare (ID or Medicare card required) and/or persons age 60 and older or 11 and under. Children under 2 ride free.

Ticket/Token Sales

DART \$10 punch card tickets may be purchased at the DART main office during operating hours or from DART drivers on the buses. Tokens, for group sales only, are also available at the main office. Payment may be made in the form of cash in exact change or checks only.

NILES DIAL-A-RIDE TRANSPORTATION



PUBLIC TRANSPORTATION Serving the Greater Niles Area

623 N Second Street
Niles, MI 49120
Phone: 269.684.5150
Fax: 269.684.5154

GENERAL RIDING TIPS

1. Call 269.684.5150 to schedule a ride.
2. Be sure to call at least one hour in advance.
3. Use the fixed route whenever possible in order to save money.
4. The use of seatbelts is recommended for all passengers. Wheelchairs must be secured.
5. Transfer tickets are available to transfer from the fixed route to demand response and vice versa.
6. Please remember that Dial-A-Ride is a shared ride service, not a taxi. You may be riding with several other passengers. We strive to make our scheduling as efficient as possible, but riders should expect to be flexible in their pick up and drop off times and schedule accordingly.
7. Feel free to call the office with questions.



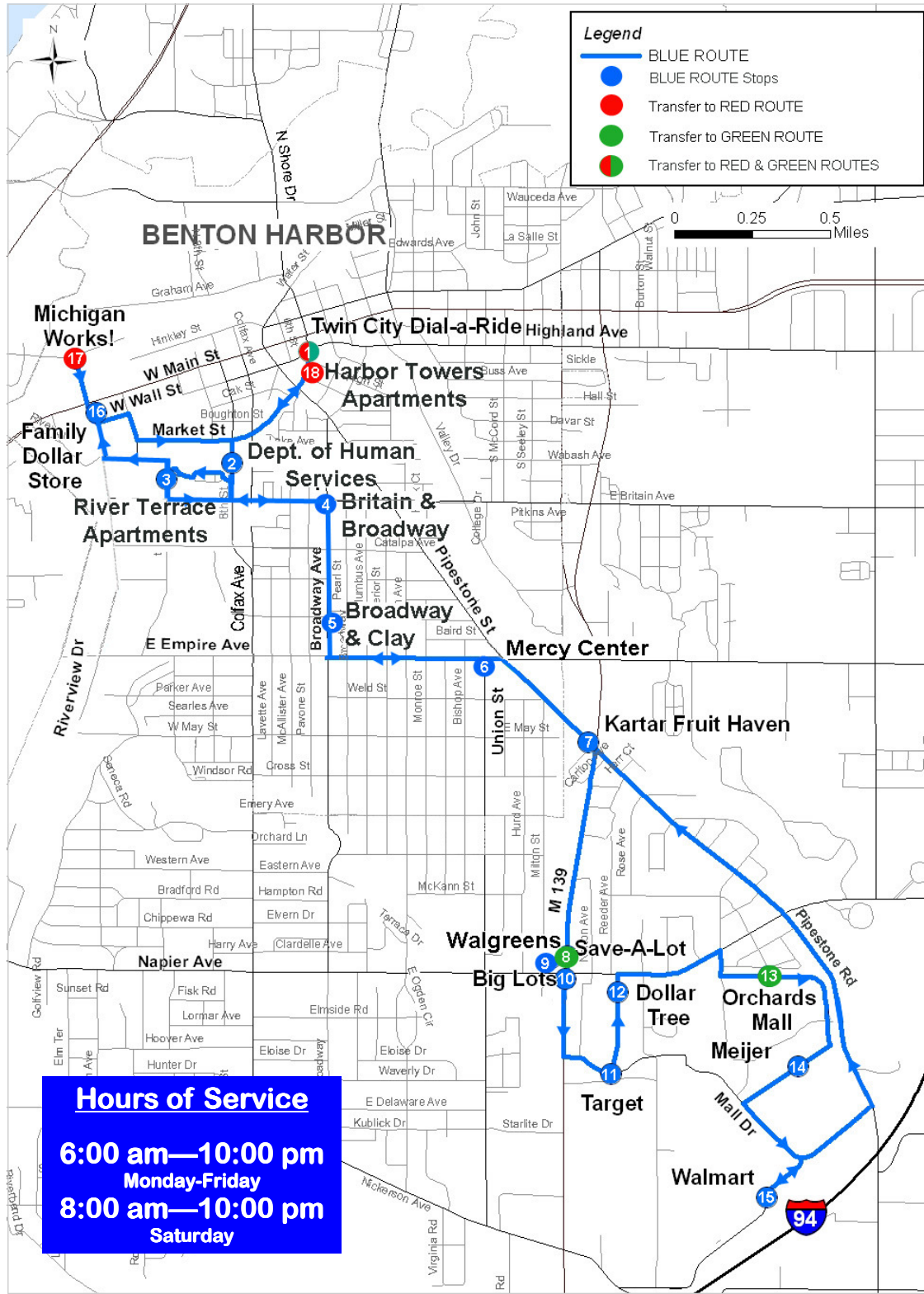
VISIT US ON THE WEB!
www.nilesdialaride.org

Fixed Route (“Route 2”) Schedule

Effective 1/3/2011

Destination	Time									
DART Office (623 N. Second St.)	10:00 AM	11:00 AM	12:00 PM	1:00 PM	2:00 PM	3:00 PM	4:00 PM			
Hi Rise	10:01 AM	11:01 AM	12:01 PM	1:01 PM	2:01 PM	3:01 PM	4:01 PM			
Harding's	10:04 AM	11:04 AM	12:04 PM	1:04 PM	2:04 PM	3:04 PM	4:04 PM			
Four Flags Plaza	10:06 AM	11:06 AM	12:06 PM	1:06 PM	2:06 PM	3:06 PM	4:06 PM			
Rite Aid	10:08 AM	11:08 AM	12:08 PM	1:08 PM	2:08 PM	3:08 PM	4:08 PM			
Martin's	10:12 AM	11:12 AM	12:12 PM	1:12 PM	2:12 PM	3:12 PM	4:12 PM			
Big Lots	10:17 AM	11:17 AM	12:17 PM	1:17 PM	2:17 PM	3:17 PM	4:17 PM			
Senior Center	10:18 AM	11:18 AM	12:18 PM	1:18 PM	2:18 PM	3:18 PM	4:18 PM			
Niles Township Office	10:19 AM	11:19 AM	12:19 PM	1:19 PM	2:19 PM	3:19 PM	4:19 PM			
Belle Plaza	10:21 AM	11:21 AM	12:21 PM	1:21 PM	2:21 PM	3:21 PM	4:21 PM			
Niles Plaza	10:22 AM	11:22 AM	12:22 PM	1:22 PM	2:22 PM	3:22 PM	4:22 PM			
Tank Town (Ciggo)	10:24 AM		12:24 PM		2:24 PM		4:24 PM			
State Line	10:27 AM		12:27 PM		2:27 PM		4:27 PM			
Auten Rd. & SR	10:31 AM		12:31 PM		2:31 PM		4:31 PM			
Rural King	10:34 AM		12:34 PM		2:34 PM		4:34 PM			
Wal-Mart	10:37 AM	11:27 AM	12:37 PM	1:27 PM	2:37 PM	3:27 PM	4:37 PM			
Big Lots	10:40 AM	11:29 AM	12:40 PM	1:29 PM	2:40 PM	3:29 PM	4:40 PM			
Senior Center	10:41 AM	11:30 AM	12:41 PM	1:30 PM	2:41 PM	3:30 PM	4:41 PM			
McDonald's	10:43 AM	11:33 AM	12:43 PM	1:33 PM	2:43 PM	3:33 PM	4:43 PM			
Martin's	10:47 AM	11:35 AM	12:47 PM	1:35 PM	2:47 PM	3:35 PM	4:47 PM			
3rd & Huron	10:49 AM	11:36 AM	12:49 PM	1:36 PM	2:49 PM	3:36 PM	4:49 PM			
3rd & Hickory	10:50 AM	11:36 AM	12:50 PM	1:36 PM	2:50 PM	3:36 PM	4:50 PM			
3rd & Broadway	10:50 AM	11:37 AM	12:50 PM	1:37 PM	2:50 PM	3:37 PM	4:50 PM			
Harding's	10:52 AM	11:38 AM	12:52 PM	1:38 PM	2:52 PM	3:38 PM	4:52 PM			
Four Flags Plaza	10:54 AM	11:40 AM	12:54 PM	1:40 PM	2:54 PM	3:40 PM	4:54 PM			
Library	10:55 AM	11:40 AM	12:55 PM	1:40 PM	2:55 PM	3:40 PM	4:55 PM			
City Hall	10:55 AM	11:41 AM	12:55 PM	1:41 PM	2:55 PM	3:41 PM	4:55 PM			
Hi Rise	10:57 AM	11:43 AM	12:57 PM	1:43 PM	2:57 PM	3:43 PM	4:57 PM			
DART Office (623 N. Second St.)	10:58 AM	11:45 AM	12:58 PM	1:45 PM	2:58 PM	3:45 PM	4:58 PM			

Blue Route Benton Harbor –Fairplain



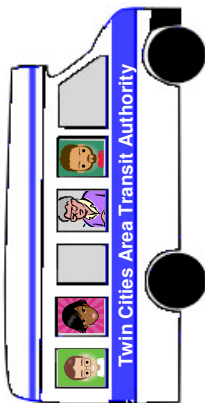
In partnership with Twin Cities Area Transit Authority, Southwest Michigan Planning Commission, Michigan Department of Transportation and the Federal Transit Administration



Twin Cities Area Transit Authority

For More Information Call:
(269) 927-4461

BLUE ROUTE



**DOWNTOWN BENTON HARBOR
BENTON HARBOR
FAIRPLAIN**

**6:00 am—10:00 pm
Monday-Friday
8:00 am—10:00 pm**



**\$1.00
Ride & Transfer!**
50 Cents for
Seniors and Disabled
(Exact Fare Required)

Dependable Service Every 1/2 Hour
to 18 Locations—No Need to Call for a Ride!

For more
information call
(269) 927-4461

TCATA

REVISED! Schedule valid beginning 4/15/10

SCHEDULE

The Blue Route runs twice each hour. **Buses A and B stop at times shown below after each hour.**

Please be at bus stop five minutes before the scheduled time.



	A	B
TRANSFER		
1. Twin City Dial-A-Ride	:00	:30
2. DHS	:07	:37
3. River Terrace Apartments	:09	:39
4. Britain Ave & Broadway Ave	:14	:44
5. Broadway Ave & Clay St	:15	:45
6. Mercy Center	:17	:47
7. Kartar Fruit Haven	:20	:50
8. Save-a-Lot	:22	:52
9. Walgreens	:23	:53
10. Big Lots	:24	:54
11. Target	:27	:57
12. Dollar Tree	:29	:59
13. Orchards Mall (Door #4)	:33	:03
14. Meijer	:36	:06
15. Wal-Mart	:39	:09
7. Kartar Fruit Haven	:46	:16
6. Mercy Center	:48	:18
5. Broadway Ave & Clay St	:49	:19
4. Britain Ave & Broadway Ave	:50	:20
2. DHS	:51	:21
3. River Terrace Apartments	:53	:23
16. Family Dollar	:56	:26
17. Michigan Works!	:58	:28
18. Harbor Towers Apartments	:59	:29
TRANSFER		
TRANSFER		
TRANSFER		

Monday—Friday:
(8am—10pm)

Start

Twin City Dial-A-Ride
6:00am

Last Stop

Twin City Dial-A-Ride
10:00pm

***Bus A does not
run between
12pm and 1pm.**

Saturday:
(8am—10pm)

Start

Twin City Dial-A-
Ride 8:00am

Last Stop

Twin City Dial-A-Ride
10:00pm

***Bus A does not
run between
12pm and 1pm.**

"Do I need to call in for a ride?"

No. The bus will be at each stop at the times shown on the schedule.

What if I want to be dropped off or picked up along the route (other than at a designated stop)?"

The bus driver will stop at one of the following nine Flex Stop locations, upon request:

- Aldi
- Factory Card & Party Outlet
- Hayward Wells Estates
- IHOP
- La Perla
- New Harbor Condos
- Pizza Hut
- Rite Aid
- The Meeting House at Fidelity

Tell the driver where you want to be dropped off upon boarding.

To be picked up from any of these nine locations, call (269) 927-4461 and request a "flex stop on the Blue Route."

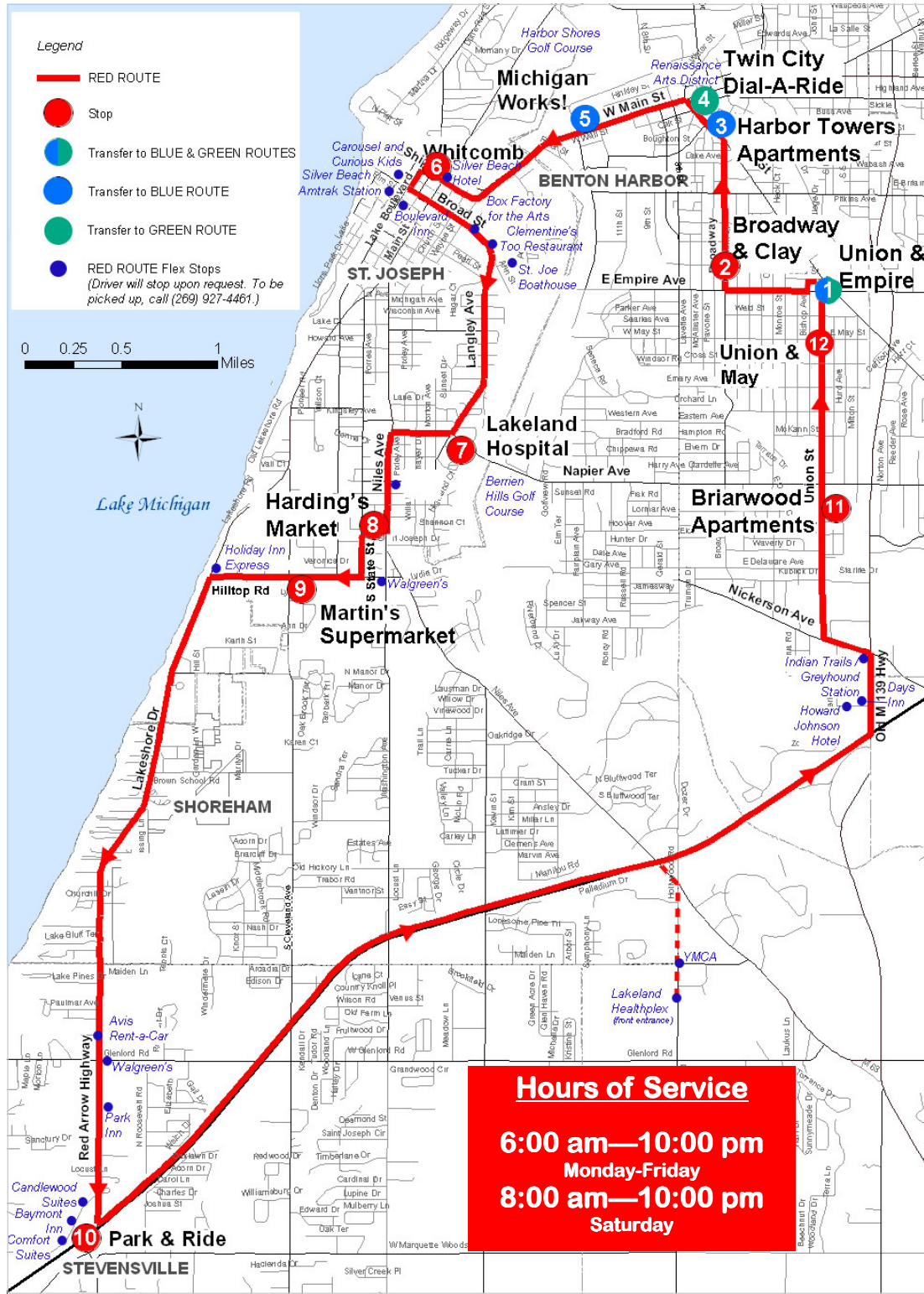
"How much does it cost?"

The fare is \$1 each way (\$0.50 for seniors/disabled), to be paid each time you board the bus.

If you are transferring to the Red or Green routes, ask the driver for your free transfer slip.

You must have exact fare to board the bus—drivers do not provide change.

Red Route Benton Harbor -Stevensville

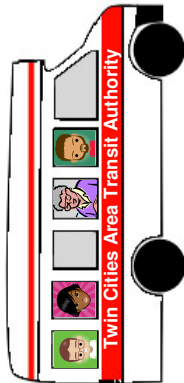


A partnership between Twin Cities Area Transit Authority, Southwest Michigan Planning Commission, Michigan Department of Transportation and the Federal Transit Administration

TCATA
Twin Cities Area Transit Authority

For More Information Call:
(269) 927-4461

RED ROUTE



**BENTON HARBOR
DOWNTOWN BENTON HARBOR
DOWNTOWN ST JOSEPH
SOUTHTOWN ST JOSEPH
ST JOSEPH TOWNSHIP
STEVENSVILLE**

6:00 am—10:00 pm

Monday-Friday

8:00 am—10:00 pm

Saturday



\$1.00

Ride & Transfer!

50 cents for
Seniors and Disabled
(Exact Fare Required)

Dependable Service Every Hour at over 11
Locations—No Need to Call for a Ride!

TCATA

For more information call
(269) 927-4461

Schedule valid beginning May 2010

SCHEDULE



The Red Route runs once each hour, and will be at each stop at the same time after each hour, as shown below.

Please be at bus stop five minutes before the scheduled time.

TRANSFER	1. Union & Empire	:04
	2. Broadway Ave & Clay St	:06
TRANSFER	3. Harbor Towers Apartments	:09
TRANSFER	4. Twin City Dial-a-Ride	:10
TRANSFER	5. Michigan Works!	:15
	6. Whitcomb (Ship St)	:20
	7. Lakeland Hospital	:30
	8. Harding's (Midway Ave)	:35
	9. Martin's side door	:40
	10. Park & Ride lot	:45
	11. Briarwood Apartments	:02
	12. Union St & May St	:03

See bus stop route map
on reverse side.

Schedules are available at www.qorideshare.org

"Do I need to call in for a ride?"

No. The bus will be at each stop at the times shown on the schedule to the left.

What if I want to be dropped off along the route (other than at a designated stop)?"

Tell the driver where you need to be dropped off (location must be on the route).

"What if I want to be picked up along the route (other than at a designated stop)?"

Call (269) 927-4461 and tell the dispatcher you are on the red route, and your location.

"How much does it cost?"

The fare is \$1 each way (\$0.50 for seniors/disabled), to be paid each time you board the bus. If you are transferring to the Blue or Green routes, ask the driver for your free transfer slip.