



Proposal to

Chartiers Valley School District

Transportation Review

Background on the School Operations Consulting Service

The Pennsylvania Association of School Business Officials (PASBO) provides the School Operations Consulting Service to assist a school entity in evaluating the operation of any of the school business areas of specialization to include the school business office, transportation, facilities, technology, purchasing, or food service operations. A specific proposal is developed to meet the unique requirements of each school entity interested in contracting through PASBO. The service provides school entities with an objective review of business operations to help facilitate the resource allocation, planning and staffing decisions of the administration and board.

PASBO selects a team of highly skilled and experienced school business officials to perform an on-site visit at the school entity and evaluate the effectiveness of the particular operation as defined in the scope of the project. The team is composed of active and emeritus members of PASBO, who possess the specific skills and experience required for each particular project.

The PASBO review team process includes studying documentation provided by the school entity in advance of the on-site visit, conducting interviews with school officials and staff on the prearranged on-site dates, comparing current business operations to recognized standards and an exit conference to review the observations and conclusions of the visit. A full written report follows the on-site visit to highlight significant accomplishments, areas identified for improvement and recommendations to achieve the desired results.

Service Objectives

- To provide interested school entities with a cost-effective opportunity to evaluate their school operations.
- Allow for an independent study conducted by experienced school business officials who fully understand the environment and have operational experience in Pennsylvania school entities.
- To permit a school entity restricted by time and other constraints to effectively utilize the talents of experienced school business officials to aid in planning the future staffing and direction of a particular operation.

The PASBO Team

The PASBO Review Team consists of a team leader and a number of team members, which varies depending on the scope of the project. PASBO is uniquely positioned to identify from the membership of the association and selecting the team leader and members based on qualifications such as:

- Appropriate Professional Registration
- Years of Experience in School Business
- Formal Education Background
- Demonstrated Leadership in Services being Reviewed
- Compatibility with Size, Organization and Geographic Area of the School Entity

Project Outline

A. SCOPE OF WORK

- i. Coordinate with the Director of Finance and Operations prior to starting this project to define the project goals and objectives.
- ii. Analysis and review of district transportation reports, financial documents, and other transportation-related information (as requested later in the proposal).
- iii. Provide for in-depth interviews with the Director of Finance and Operations, the Interim Transportation Director, and other Transportation personnel as deemed appropriate.
- iv. Provide a comprehensive on-site review of the transportation operations during which time the PASBO Study Team would:
 - a. Analyze the routing of vehicles and schedules for arrivals and departures from school buildings.
 - b. Validate the route mileage and record-keeping practices of the transportation department.
 - c. Review the district transportation map and compare to the current operation. Analyze the efficiency and utilization of the current transportation routing software.
 - d. Check the transportation policy to ensure transportation practices comply with district policy, and identify policy language that supports or detracts from implementing cost efficiencies in the transportation operation.
 - e. Review the major routes of non-reimbursable pupils, and determine if the district should apply for hazardous routing identification for these routes.
 - f. Compare district transportation costs to others in the state and region.
 - g. Review computerization of non-routing operations.
 - h. Review processes with the intent of maximizing state reimbursement, improving record keeping, and other best practices related to student transportation operations.
 - i. Review and recommend cost effective solutions and to maximize state subsidy.
 - j. Review current transportation operations for best practices.
 - k. Review existing contract provisions, provide recommended items to current contract based on review and discussions with Administrative team, and provide addendum as needed.
 - l. Develop comprehensive specifications for a Transportation RFP.
- v. Provide an exit conference prior to leaving the district.
- vi. Prepare a comprehensive report with recommendations to obtain transportation cost efficiencies, to include both internal efficiency and outsourcing options as appropriate.
- vii. Upon completion of the review, a draft of the report will be delivered and reviewed with the Director of Finance and Operations and other administrators as directed.

viii. Fifteen (15) copies of the approved final report will be provided.

B. THE DISTRICT WILL PROVIDE to PASBO IN ADVANCE OF THE IN-PERSON VISIT:

- i. Written policy from the local school board regarding all aspects of school transportation.
- ii. Copies of the PDE Form 1043, "Notification of Intent to Provide Pupil Transportation Services" for the current school year and the previous school year.
- iii. Copies of the PDE Form 1049, "Summary of Pupil Transportation" for the previous three school years.
- iv. The reimbursement summary PDE 2576 for the previous three years.
- v. Copies of all contracts with providers of service for current school year and the previous school year.
- vi. Copies of job descriptions/duties for all transportation personnel.
- vii. Labor agreements in which Transportation staff are included.
- viii. Copies of all materials given to transportation personnel regarding:
 - Bus Rosters (copies of all)
 - Bus Schedules (copies of all)
 - Route Mileage/Tracking Forms (made available on site)
 - Locations of Hazardous Routes (copies of all)
 - Entry/Withdrawal/Change of Address Documents (made available on site)
- ix. Contractor payment calculations or invoices for the current school year and the previous school year.
- x. Copies of fuel purchase agreements or bids for the current year and previous two years.
- xi. Schedule for arrivals and dismissals at all school buildings.
- xii. Listing of non-reimbursable students and stop locations.
- xiii. Map of school district identifying school attendance areas.
- xiv. Copy of transportation budget for the current school year.
- xv. Copy of transportation financial report information for the previous two school years.
- xvi. Information as it relates to the current routing software including, but not limited to, the manual of operating procedures.
- xvii. Copies of school bus purchases from the past two years and future planned replacement cycle.

C. VALIDITY

This Proposal is valid for a period until June 30, 2024 from the receipt of the hard copy document provided for execution. This project can begin any time mutually agreed to after June 3, 2024. Every effort will be made to provide a draft written report within 30 days of the conclusion of the on-site visitation but cannot be guaranteed until 45 days after the conclusion of the on-site process. The days the consultants will work in the School District are determined cooperatively. The School District information requested above needs to be received by the PASBO office at least two weeks before the on-site visit.

D. COSTS

The total cost of the review as outlined in the Scope of Work shall be \$10,000 for professional fees and related expenses for a two-day study and utilizing a two-three-member Team. The related expenses for the purpose of this proposal shall be those direct expenses which can be assigned to the project, such as, but not limited to, travel, lodging, meals, printing, clerical, and telephone and fax costs. The costs to make a board presentation are not included. The cost for a board presentation is dependent upon method of presentation (on-site or videoconference) and is offered as an optional service to the School District.

A payment of 50% of the project cost will be paid to PASBO upon acceptance of this proposal. The balance of the project costs will be invoiced upon delivery of the final written report.

E. CONSULTANT STAFF


The PASBO designated project lead consultant will directly supervise all on-site activities and consultant work assignments. All aspects of the study will be under the lead consultant's direction. For this project, PASBO's lead consultants will be Bobbi Billman and Dale Kirsch.

F. INDEMNIFICATION

The School District agrees to defend and indemnify PASBO and its consultants against wrongful acts, unless PASBO or its consultants act with impropriety or illegality on the district's behalf, from all third-party claims arising from conducting this project.

G. ACCEPTANCE

Chartiers Valley School District



Hannah Barrick, JD
Executive Director, PASBO

Date

5/28/24

Date