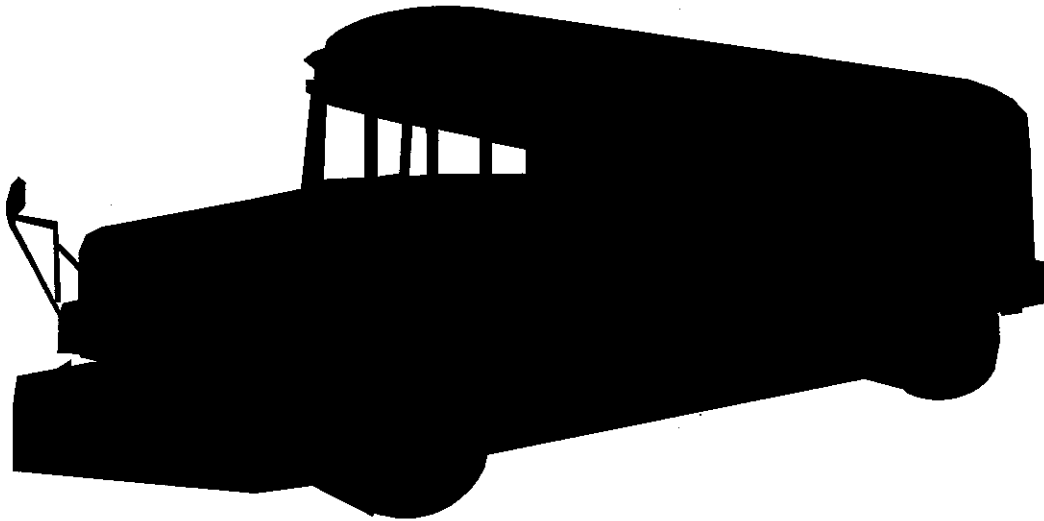


*Encl. 10.1
April 1, 2010*

TAS

PROPOSAL

**ROUTING EFFICIENCY and STOP LOCATION
OPTIONS REVIEW
for
GREATER SOUTHERN TIER BOCES**



Submitted by:

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March 4, 2010

SCOPE

Based upon discussions held with the Horseheads Central Schools District and representative from the Greater Southern Tier BOCES, our knowledge of the region through previous engagements, and our 23 years of providing dedicated student transportation consulting services, we have compiled this targeted review of the routing efficiency that has been achieved by the Horseheads Central School District through the use of the routing software developed by BOCES at the District's direction. In addition to reviewing the current routing protocols, TAS has been requested to assist with an evaluation of various bus stop scenarios for future consideration. With the on-going assistance of both District and BOCES personnel, TAS will provide the following services:

1. **Software use and capabilities** – It is our understanding that the District is utilizing a proprietary routing software program developed by the Greater Southern Tier BOCES. We will review this program to evaluate its capabilities to assist with the routing efficiency and stop location review requested by the District. Although we are familiar with several of the national routing software programs, we have not utilized or reviewed the proprietary system in place in the District.

Throughout this evaluation process, TAS has assumed that technical assistance and program operation will be provided by District and/or BOCES staff members. We have assumed that the routing software is operating off a current data base, that the maps are accurate, and that fully trained personnel from the District or BOCES will be available to offer assistance.

If appropriate, we will recommend software changes to be considered in the future to assist with the management use of the programs.

2. **Current Routes** – With the assistance of District personnel, TAS will evaluate the overall efficiency of the District routes. This review will entail an evaluation of the scheduled versus actual ridership, bus capacity, and run times within the bell time parameters and Board Policies established by the District. The review will be based on data reviews and discussions with stakeholders. It is not our intention to “ride the routes” as this requires an extensive amount of time and is typically not productive in determining efficiency options.

Any review of District routes must incorporate an evaluation of the out-of-District demands and schedules.

Depending on the data available, TAS may request that the District perform a ridership audit which will entail detailed logs developed by drivers identifying start and stop times, actual ridership, and route descriptions.

We will discuss with District personnel the protocol for the establishment of routes, and explore options that may allow increased efficiencies. Included within

this process would be the identification of any limitations that may restrict greater efficiencies including formal policies, program precedents, labor agreement restrictions, physical site limitations, and more.

Depending on the capabilities of the routing software, it may be appropriate for District personnel to construct and run various routing scenarios to determine the viability of routing changes. **TAS** would be involved in the design of the options, and evaluation of the outcomes, but District or BOCES personnel would be responsible for the actual routing software program operation.

3. **Service Level Options** – Based upon conversations with both District and BOCES staff members, the current software may be limited in its ability to assist with the determination of eligibility limits. Within the framework of what information may be available, **TAS** work with District or BOCES personnel to identify the students that may be impacted if the District were to consider changing the walker distances in the future.

This aspect of the **TAS** engagement will only be completed if the information on student distances can be developed with the assistance of the District and BOCES. If **TAS** cannot determine distances based on the routing system features, we will identify options that could be explored by the District to achieve the goal of reviewing service options.

This process entails the establishment of defined distances from school buildings by student grade levels, and then consistently applying this distance radius to each building placing students in like circumstances. Once these students are identified, **TAS** will work with District personnel to identify the routing and bus use impact of removing these students from transportation services.

The District will be asked to identify the various distance options by grade levels. For example, a common configuration might entail all kindergarten students transported, grades 1-6 walk up to ¼ mile, grades 7-12 walk up to ½ mile.

In order to identify potential savings, **TAS** will work with the District to develop a cost estimate parameter that can be applied to each bus that is eliminated in this type of review. The establishment of this parameter will entail the identification of variable cost standards including but not limited to labor costs, operating expenses, capital costs, and more.

It is important to state that service level changes may require voter approval, and Board Policies may need to be reviewed by legal counsel for their compliance with State regulations. Additionally, bell time changes may impact various educational programs or agreements and will need to be reviewed by the District.

METHODOLOGY

Given that we are not familiar with the operation or the capabilities of the routing software system, we are recommending that this engagement be predicated on a per diem rate for the services performed. As the engagement progresses, **TAS** will notify both BOCES and the District of the review progress and of any limitations that may limit any aspect of the desired review. Additionally, given the nature of this type of review, we will attempt to utilize District or BOCES personnel to conduct evaluation under our guidance, thereby limiting our time commitment to the engagement. Unfortunately, we cannot identify the impact of the use of local personnel at this early stage.

TAS would charge a per diem rate, based upon half-day charges, for information review, travel time, on-site reviews, meetings, and report generation. At all times we would keep BOCES and the District informed as to time spent to date, and any projections of future work needed. At any time BOCES may terminate the engagement with payment only required for services provided to date. Based on the Scope of Services, following is our estimate of time/costs:

ACTIVITIES	TIME/COST
Retainer to cover phone calls, short office review of materials, and miscellaneous time spent while not on-site.	\$1,000
Data collection instrument development, and data review	1 day
Conduct interviews with stakeholders, and travel	2 days
On-site work with staff members on routing options, and travel	5 days
Development of reports and options	2 days
Miscellaneous – “just in case” time	1 day
Total time	11 days
Total cost (\$720 per day plus retainer). This does not include the cost of out-of-pocket expenses.	\$8,920

We would be prepared to begin the development of the data collection instrument within one week of our receipt of the Purchase Order evidencing the BOCES’ commitment to the engagement. This data collection instrument will request background information about the District including but not limited to labor agreements, labor cost data, fleet lists, bell times, ridership data (if available), Board Policies, and more.

It is our understanding that this engagement will be focused on the needs of the Horseheads Central School District. However, **TAS** will be engaged directly by the Greater Southern Tier BOCES. Although that is certainly acceptable to **TAS**, it must be stated that our ethical responsibility will be to the District and any recommendations will be focused on those changes or positions which are in the best interest of the District. It is possible that recommendations may entail changes to the software system, or may entail comments on issues that may have a negative impact on the BOCES software service. Should a potential conflict of interest arise, we will bring this to the attention of the District for their review and consideration.

It would be our intention to work with both the BOCES and the District to establish a definitive time schedule for the entire process. It will be important for the BOCES/District, and TAS, to consider on-going efforts (budget development; budget votes; referendums; workloads) as a schedule is developed. The general time frame would be as follows:

Contract with TAS	Arp '10
Data collection and review	Apr '10
On-site reviews	Apr - May '10
Interviews	Apr - May '10
Recommendations	May - June '10

TAS would expect to have reasonable access to BOCES and District personnel, projections and records. We request that one official be designated as our liaison to facilitate our access to information, and to ensure that we provide the type of reporting that is desired.

TAS will utilize various members of our consulting/operations staff as the demands require. Mark A. Walsh, **TAS** Partner, will be assigned as the Project Leader. Mr. Walsh has received the internationally recognized **Certified Management Consultant** designation, demonstrating his commitment to the highest ethical standards, his extensive experience, and his professional recognition within the industry. Mr. Walsh is the only student transportation consultant in the United States to receive this designation. Louis J. Boffardi of **TAS** may serve as a Project Consultant. Mr. Boffardi brings to the engagement extensive experience at both educational administration and transportation software utilization. Background information on both consultants can be found in the accompanying **TAS** materials, or on the **TAS** website.

Any modifications to the approved program will be detailed in writing and BOCES approval will be requested. The estimated costs of these modifications, if any, will be made available to BOCES prior to approval. This engagement is based on per diem fees so requests for meeting attendance or program reviews not envisioned in the Scope will entail additional consulting expenses.

BENEFITS

TO BOCES and the DISTRICT:

It would be our intention to have this consulting engagement result in:

- ☒ A detailed review of the routing and fleet use efficiency of the District's program
- ☒ The development of alternatives for various service levels including operating and cost projections
- ☒ Identification of program restrictions that may negatively impact transportation efficiencies
- ☒ Communication to the District relative to the pro's and con's of various scenarios that may be considered by the Community
- ☒ A third-party review of the efficiency of routes and services, and an independent evaluation of the effectiveness of the routing software program

OF RETAINING TAS:

- ☒ TAS is an independent consulting firm with an extensive and proven record of successful transportation program reviews, including work with several recognized software programs.
- ☒ TAS offers the Greater Southern Tier BOCES and the Horseheads Central School District professional consultants with unique qualifications not found with any other firm. We provide both public and private sector perspectives that are a "must" to truly develop and evaluate effective transportation programs.
- ☒ The Greater Southern Tier BOCES will retain a firm which has provided a variety of services to over 400 districts since our founding in 1987, including extensive experience working within the regulatory framework of New York State. This offers a level of confidence that will assist with public analysis of the program and the alternatives presented.
- ☒ TAS has an understanding of the District's program based on previous engagements.
- ☒ TAS has demonstrated its commitment to customer support through our availability to answer questions, and provide perspectives, after engagements are completed. TAS will continue to be a valuable resource to the BOCES for transportation questions and issues.

FEE STRUCTURE

In the Methodology section of this report we identified our estimates for the time that would be required to accomplish the engagement. As stated, charges would only be for those services that can be accomplished within the framework of the routing software system. In all cases the per diem fees would be supplemented by out-of-pocket expenses as follows:

TERMS:

1. Retainer billed at inception of engagement - \$1,000.00
2. Per diem rate billable on a monthly basis with District approval of all time - \$720 per day
3. All expenses related to the performance of this contract will be reimbursed to **TAS** by the BOCES. Expenses will consist of mileage at the IRS approved rate (currently 50 cents per mile in 2010), shipping charges, printing, road tolls, lodging, meals, and any other direct expenses related to the study that are approved by the BOCES. **TAS** will provide the BOCES with copies of all receipts for expenditures with the exception of mileage. **Whenever possible, we will attempt to coordinate travel with other area engagements with expenses allocated fairly.**

Expense reimbursements are due within two weeks of submission to the BOCES, and are usually submitted on a monthly basis.

ACCEPTANCE:

To signify the BOCES' acceptance of this proposal, please provide us with a duly authorized Purchase Order, specifying your acceptance of the terms and conditions of this proposal. **TAS** will then issue the BOCES an invoice for the retainer. If additional contract documents are required by policy, please submit them to us for completion.

Given the need to schedule engagements to meet the requirements of our clients, **TAS** reserves the right to modify or withdraw this proposal if it has not been accepted by the BOCES within 60 days of its issuance.