

**CONCORD PUBLIC SCHOOLS
CONCORD-CARLISLE REGIONAL SCHOOL DISTRICT**

120 MERIAM ROAD CONCORD, MA 01742 PHONE: 978.318.1500 FAX: 978.318.1537 www.concordpublicschools.net

TO: Concord/Concord-Carlisle School Committees
FROM: Diana Rigby, Superintendent
DATE: October 23, 2012
SUBJECT: Final Reading and Approval of School Committee Policies

Motion: That the Concord/Concord-Carlisle School Committees vote to approve the attached revised School Committee Policies.

- File: AC – Nondiscrimination
- File: ACA – Nondiscrimination on the Basis of Sex
- File: BDFA-E-1 – School Improvement Plan
- File: BEC – Executive Sessions
- File: EBC – Emergency Plans
- File: GBA – Equal Employment Opportunity
- File: GCF – Professional Staff Hiring
- File: IJ – Instructional Materials
- File: JB – Equal Educational Opportunities
- File: JBA – Student-To-Student Harassment
- File: JFBB – School Choice
- File: JLC – Student Health Services and Requirements

Attachment

**CONCORD PUBLIC SCHOOLS
CONCORD-CARLISLE REGIONAL SCHOOL DISTRICT**

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TO: Concord-Carlisle Regional School Committee
FROM: Diana Rigby, Superintendent
DATE: October 23, 2012
SUBJECT: Gift Acceptance – Donation from the Ruetters Family Charitable Foundation

Motion: That the Concord-Carlisle Regional School Committee accept a gift in the amount of \$25,000 to Concord-Carlisle High School Ruetters Enrichment Series Fund.

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120 MERIAM ROAD CONCORD, MA 01742 PHONE: 978.318.1500 FAX: 978.318.1537 www.concordpublicschools.net

October 11, 2012

TO: Concord Finance Committee

FROM: Diana F. Rigby, Superintendent
John Flaherty, Deputy Superintendent

RE: Annual Budget Data Requests

Our presentation this evening provides a focused response to questions and requests for information in the August 2012 Annual Budget Data Request memorandum from the Concord Guidelines Subcommittee Chair, John C. Hutchins. Budget discussions for FY14 are underway with the principals and central office administrators. Our core budgeting principles include the following:

- Students and their learning are at the center of decisions;
- Teaching and learning conditions matter for student success;
- Requested resources for programs, services, and activities reflect the districts' core values of academic excellence, respectful and empathic community, professional collaboration, educational equity, and continuous improvement;
- Maintain balance between responsive and reasonable operating budgets and funding for the high school building project.

The school committees will give direction to the administration as we move forward in the process.

CONCORD-CARLISLE HIGH SCHOOL

The major focus for FY14 CCRSD budget development is to ensure a strong academic program at the most reasonable cost. This is critical to both communities as we work towards high school project reimbursement funding being restored. We have maximized our existing resources of in-district funds and anticipated circuit breaker receipts in FY2014 budget development to lower operating budget assessments.

For the first time in several years we have planned the FY14 budget at full current DOR values for State aid as the States' finances seem more stable. We have used excess and deficiency (E&D) funds in the regional budget development to lower the impact of assessments to Concord and Carlisle. In the recent and more fiscally challenging years, we have significantly increased our contributions to lessen the assessment impact. For FY11 and FY 12, we contributed \$425,000, and for FY 13 we increased the in-district contribution to \$600,000, our planned FY14 in-district contribution is also \$600,000. Our FY11 E&D certification is \$1,166,660. Our projection for FY12 E & D certification is in the 4.7% range as we work to preserve the current Aaa bond rating which is critical to the Region's future borrowing needs.

Question 1. What specific factors contributed to substantially higher per-pupil expenditures for CCRSD in FY2011 than for Lincoln-Sudbury, Acton-Boxborough, and Dover-Sherborn high schools? Than for the Bedford, Lexington, Wayland, and Wellesley K - 12 school systems? Please discuss in terms of costs of

- Total instruction
- Materials and technology
- Administration
- Pupil services
- Special education
- Guidance and counseling

Comparing a K12 system to a 9-12 high school is misleading because K12 systems are more efficient. The number of teachers needed at the K5 level is much lower than the 9-12 level. The only true 9 – 12 comparison in the group is Lincoln - Sudbury.

As shown below, the CCRSD's teaching contract's highest salary is the second highest in the comparison group; this factor increases PPE in the Instruction, Pupil Services, Special Education and Guidance and Counseling areas.

Top Step	FY2012	FY2013	FY2014
CCRSD (9-12)	\$ 101,920	104977	108127
Acton Boxborough (7-12)	\$ 76,357	77357	
Dover Sherborn (6-12)	\$ 97,848	98826	
Lincoln Sudbury (9-12)	\$ 101,514		
Bedford	\$ 86,191	86622	87925
Lexington	\$ 94,677		
Wayland	\$ 104,844	105877	
Wellesley	\$ 86,589	87455	
Average of Comparison Group	\$ 92,574	\$ 91,227	\$ 87,925
CCRSD To Group Comparison	10.10%	15.07%	22.98%

Additionally, CCRSD's teacher contract caps workload at 90:1 students within departments, or 95:1 for compelling reasons. CCRSD's course load of four teaching periods, in comparison to other districts is also lower which translates into more teachers being needed at CCHS. And, since our teachers are paid higher than those of teachers in the comparison group, our costs are higher.

In regard to Materials and Technology, we believe we have one of the strongest integrations of technology in the classroom within the state and this cost is reflected in CCHS's PPE. To prepare our students for the skills demand of the future, this is a vital expenditure.

Question 2. Why did per-pupil expenditures increase so rapidly during FY2010 - FY2012?

In FY10, expenditures increased \$1,076,754, approximately \$310K of increases in special education transportation, bus replacement and insurance costs made up 30% of the increase, the other \$800K was mainly in salary escalation and instructional computer technology infusion.

In FY11, non-salary expenditure increases in the following areas drove the majority \$1,283K increase: instructional computer expenditures dropped 200K, but the system's network required bandwidth increases and networking component replacements at \$375K, science and social studies instructional materials and equipment increased \$75K, SPED \$300K, building repairs in operating budget \$85K, replaced maintenance vehicle \$42K, legal costs \$40K, fuel and electricity \$70K, insurance \$150K, and a reserve of \$250K for the technology stabilization fund is also reflected.

In FY12, the \$996K expenditure increase is made up of the following: instructional technology increased by \$200K, foreign language texts \$35K, professional development \$25K, building repair \$100K, network expenditures \$270K, bus driver salaries \$50K, SPED transportation \$70K, OPEB \$250K reserve.

Question 3. What are your top 3-4 priorities in terms of improved learning/development effectiveness over the next 5-7 years? What are the desired outcomes? What resources will be needed? What performance milestones should we expect?

The top priorities over the next 5-7 years include increasing the number of high school students who master critical end of course standards, score proficient/advanced on the Math and English Language Arts (ELA) MCAS, maintaining 100% competency determination for every graduating student, increasing the number of students who participate in at least one co-curricular activity each year they attend CCHS, increasing the number of seniors who report a connection to at least one adult during their high school tenure, increasing the use of digital tools, Moodle, etextbooks, and 1:1 laptops, implementing Common Core Standards, common assessments, and data teams, developing professional collaboration to analyze student work and adjust instructional practices to improve student learning, and implementing the new educator supervision and evaluation model. The outcome benchmarks include the following: 85% of CCHS students earn 2.0 or higher, 90% Adv/Prof on ELA MCAS at Grade 10, 80% Adv/Prof on Math MCAS, 100% Competency Determination, 90% IEP goals for Special Education students, CCHS students use digital tools to demonstrate content understanding, data teams regularly use protocols for looking at student work, analyzing data, and adjusting instructional practices, 90% students participate in at least one co-curricular activity each year they attend CCHS, and 100% of seniors report a connection to at least one adult. (See attached District Goals 2012-13).

Resources needed include maintenance of staffing levels, professional development, teacher collaboration time, increased technology tools, and increased administrative technology tools for the supervision and evaluation system.

Question 4. What is the outlook for the growth rate in total operating expenditures for CCRSD over the next five years?

Based on historical spending patterns and currently known collective bargaining agreements CCRSD operating expenses are anticipated to require 3-5% funding increases. Variations in state funding levels for circuit breaker reimbursement levels could negatively affect this projection.

What is the outlook for total enrollments at CCHS? For the Concord/Carlisle Ratio? For METCO and other non-resident students?

While we believe we will be stable in the 1,200 to 1,225 range for the next few years, it will be important to consider the recent significant increase of over 180 students in the past two years at CPS. Further out we will need to assess the impact of Carlisle's new building to determine its impact on their declining enrollment. The assessment ratio is projected by NESDEC to increase Concord's proportion of costs as shown in the following chart. METCO and non-resident populations are projected as being stable.

**Projected Distribution of Concord and Carlisle Residents at CCHS
Based upon NESDEC Projections October 4, 2011**

School Year	Gr. 9-12 Enrollment	Resident Enrollment	Concord Residents	Concord %	Carlisle Residents	Carlisle %
2011-12	1,209	1,130	811	71.77%	319	28.23%
2012-13	1,206	1,126	803	71.31%	323	28.69%
2013-14	1,217	1,143	816	71.39%	327	28.61%
2014-15	1,220	1,153	825	71.55%	328	28.45%
2015-16	1,238	1,177	840	71.37%	337	28.63%
2016-17	1,228	1,167	840	71.98%	327	28.02%
2017-18	1,227	1,164	862	74.05%	302	25.95%
2018-19	1,257	1,192	889	74.58%	303	25.42%
2019-20	1,266	1,201	921	76.69%	280	23.31%
2020-21	1,282	1,214	948	78.09%	266	21.91%
2021-22	1,230	1,164	899	77.23%	265	22.77%

What is the outlook for Special Education expenditures, out-of-district placements and reimbursements?

The short term outlook for special education expenditures is encouraging. In our development of the FY2014 request we have reduced out-of-district budget line items by \$500K. However, we do know that need in the K8 district will eventually make its way into the high school environment. Our early intervention strategies have been helpful in mitigating special education costs. The reimbursement forecast is also encouraging; as State finances have improved the reimbursement percentages have been approaching the legislated level of 75% above the threshold of \$40,516.

What is the outlook for faculty compensation including steps, scales, and lane changes? Please provide a summary of the major collective bargaining agreements (those covering more than ten employees) showing the duration of each such contract, its expiration date, the number of employees covered by the agreement and the annual escalators in the contract for FY 12, 13, 14 and 15 (if applicable) for salary steps, lanes and scales, employee compensation, and what changes you foresee over the next five years.

The table below summarizes the status of our seven collective bargaining units with

more than ten employees. The table also identifies the number of teachers at top step in their respective teacher association.

Collective Bargaining Status

	<u>FY2012</u>	<u>FY2013</u>	<u>FY2014</u>	<u>FY2015</u>	<u>Expiration</u>	<u>Members</u>	<u>Top Step</u>
Concord Teachers Association	0.75%	2.00%	2.00%	1.75%	6.30.15	198	32.9%
All Steps 4%							
Lanes							
B to B15 - 5%							
B15 to Masters 11%							
Beyond Masters approximately 2.5% for each additional 15 graduate credits							
Concord-Carlisle Teachers Association	Steps 1 -16 0.75%	2.25%	2.25%		6.30.14	123	39.5%
Steps 1-15 4%	Step 16 Only	0.75%	0.75%				
B to B15 - 5%							
B15 to Masters 11%							
Beyond Masters approximately 2.5% for each additional 15 graduate credits							
Secretaries Unit	2.00%	2.00%			6.30.13	37	
CPS Building Service Workers	2.25%	2.25%	2.25%	2.25%	6.30.15	15	
CCHS Building Service Workers	2.25%	2.25%	2.25%	2.25%	6.30.15	9	
Bus Drivers Unit - Expired	3.10%				6.30.12	31	
CCHS Tutors	2.00%	2.00%			6.30.13	30	

Please comment on recent trends in the costs of employee benefit programs, how those costs have been changing as a percentage of overall employee compensation, and what changes you foresee over the next five years.

In the past three years we have seen stabilization in the rate of increases for medical insurance and the impacts of legislative changes have allowed us to reduce our budgetary needs to fund this benefit in the FY2014 budget development process. On a longer term basis, the inflationary pace of employee benefits has exceeded the rate of salary escalation resulting in a greater level of benefits within total compensation. Looking forward, changes in national policy, a growing awareness of dietary impacts and proactive wellness plans may result in positive cost trends.

Please discuss your plans for meeting the Region's obligations for FY14 and projected through FY18 for funding retirees' other post-employment benefits (OPEB) and anticipated changes in the amounts to be paid during those years toward unfunded pension liabilities.

The Concord-Carlisle Regional School Districts plan for meeting the OPEB would be to increase the funding level by \$100,000 per year till the Annual Required Contribution (ARC) is reached. However, the current amount in the FY2014 CCRSD request is \$300,000, which is only \$25,000 more than the FY2013 level.

What is the outlook for numbers of faculty FTEs, administrative FTEs, and total FTEs? Please indicate what percentage of your faculty has now achieved the highest step in the pay grade.

Instructional FTE levels will respond to changes in enrollment, and additions or deletions of program. Administrative FTE levels may need to increase in order to provide responsiveness to an increasingly more complex technology environment, more demanding state reporting, new supervision and evaluation process, HS project administration, and public records requests.

What are the main uncertainties that you face in projecting forward?

Our main uncertainties moving forward are costs associated with enrollment, special education, adequately funding technology, landfill remediation and transportation costs.

How would programs, staffing, faculty levels or information technology plans be affected if the FY 14 budget were to be approved (a) with only a 2% increase above the FY 13 budget? or (b) with no increase at all over the FY 13 budget?

(a) A 2% operating budget request would be .64%, or \$151,653 below our current planning increase. This would be equivalent to a reduction of approximately 3-4FTEs, or a reduction in planned OPEB reserve.

(b) A 0% operating budget request would be \$624,600 below our current planning increase. This would eliminate the planned OPEB reserve, the equivalent of 6.5-8 FTE or the reduction of \$178K in budgetary resources for technology expenses and reductions in supplies and materials of \$146,600.

Question 5. What level of capital expenditures is planned over the next five years? Please identify what expenditures will be proposed to be financed through the issuance of long-term debt and what expenditures will be proposed to be financed as capital outlays within the current budget of each year (without debt issuance)?

\$92,500,000 of capital expenditure is planned for the new high school project to be financed through the issuance of long-term debt. There are no current capital outlay plans for interim projects in the existing facility; we plan on spending for necessary health and safety issues only.

Question 6. Please discuss any anticipated changes in the FY 13 budgeted amount for transportation services and the amounts you contemplate for the FY 14 budget and over the next five years.

The following chart identifies an estimated \$333K of FY2013 unanticipated expenses for fuel, labor and leases for transportation services. The \$333K will be allocated on 60/40 ratio to CPS and CCRSD. The FY2014 budgets include \$350K for transportation expenses. The FY2014 budgets do not include any funding requests for bus replacements.

FY13 Additional Transportation Costs	Lease Cost	FY13 Cost	FY13 Allocation		FY14	FY14 Allocation		FY15
			CPS	CCRSD		CPS	CCRSD	
Leasing								
Billerica Facility Lease	\$42,000	\$ 42,000	\$ 25,200	\$ 16,800	\$ 45,000	\$ 27,000	\$ 18,000	\$ 48,000
Proposed Acton Facility Lease*	\$48,000	\$ 36,000	\$ 21,600	\$ 14,400	\$ 50,400	\$ 30,240	\$ 20,160	\$ 54,000
Office Trailer with Restroom (46' x 12' - planning number only plus tight tank allowance)		\$ 28,000	\$ 16,800	\$ 11,200	\$ 28,000	\$ 16,800	\$ 11,200	\$ 29,400
-- FY 13 cost assumes 10/1/12 lease signing								
Associated Labor Costs								
Additional driver time with Acton starting point (6.8 Miles from Townhouse) and with Billerica repair facility.								
ST Rate	-- 2 X .5 hrs X 36 Drivers X \$22.38 X 180 school days =	\$ 145,022						
OT Rate	-- 2 X .5 hrs X 36 Drivers X \$33.57 X 180 school days =	\$ 217,534						
Blended Rate (50% OT/50% ST)		\$ 181,278	\$ 108,767	\$ 72,511.2	\$ 181,278	\$ 108,767	\$ 72,511	
** Used top step of FY12 labor rate -- \$22.38 straight time								
Associated Fuel Costs								
Additional Driver fuel cost with Acton starting point -- 2 gallons a day @ \$3.51 per gallon X 36 buses X 180 days of school								
	2*3.51*36*180=	\$ 45,490	\$ 27,294	\$ 18,196	\$ 45,490	\$ 27,294	\$ 18,196	
Estimated range of cost associated with Acton based operation is \$190K to \$263K for labor and fuel.								
		\$ 332,768	\$ 199,661	\$ 133,107		\$ 210,101	\$ 140,067	
60 days to sign Acton RFP after due date of August 31, NLT October 30								

Question 7. Please report on the amounts in all stabilization and reserve funds and any planned uses of or additions to those funds in FY 14.

The CCHS Stabilization fund created after the 1992 projects has a balance of \$8,187.21 as of September 30, 2012, The Technology Stabilization fund has a September 30, 2012 balance of \$293,554.68. The newly authorized CCHS Special Education stabilization fund does not contain any funds to date. An addition to the Technology Stabilization will be determined in the FY2012 closing process and is currently estimated to be above \$250,000.

Question 8. Please provide information as to the actual or anticipated amount in the E&D account at the end of each of FY 12, 13 and 14 and how those amounts were or may be used in the following year.

The FY2011 certified E & D amount is \$1,166,660. FY2012 -2014 anticipated percentage levels are in the 4.5% to 4.9% range. These funds will be used to reduce assessments to member communities, but will also be kept as close to the statutory ceiling of 5% to show financial strength to the lenders.

Question 9. Please report on all off-budget sources of funding, including all receipts, fees, federal, state and other grants for FY12, FY13 (as known to date) and anticipated or planned for FY14, including the finances of our METCO program (inclusive of transportation).

Please see chart below.

DESCRIPTION	FY10 SC Budget	FY11 SC Budget	FY12 SC Budget	FY13 SC Adopted Budget	FY14 Planning - Operating Budget-
GENERAL FUNDS					
TOTAL GENERAL FUND BUDGET LEVELS	22,357,071	23,498,427	23,981,012	24,290,423	26,691,126
- less debt service	1,038,831	1,124,235	747,738	643,036	2,419,139
GENERAL FUND OPERATING BUDGET LEVEL	21,318,240	22,374,192	23,233,274	23,647,387	24,271,987
EXTERNAL FUNDS					
FEDERAL GRANTS	617,875	754,197	385,366	378,738	378,738
STATE GRANTS-METCO	423,620	380,669	386,933	375,290	375,290
COMMUNITY CHEST	24,000	24,000	15,000	15,000	15,000
EXTERNAL FUNDS TOTAL	1,065,495	1,158,866	787,299	769,028	769,028
ALL FUNDS TOTAL	23,422,566	24,657,293	24,768,311	25,059,451	27,460,154
EXTERNAL FUNDS AS % OF GRAND TOTAL	4.5%	4.7%	3.2%	3.1%	2.8%

Question 10. Please provide an overview of any contemplated changes in the criteria CCRSD uses to measure its performance and cost-effectiveness.

There are no changes contemplated.

CONCORD PUBLIC SCHOOLS

Question 1. Please discuss the factors that have impacted per-pupil costs most significantly in FY11, 12 and 13, the outlook for those factors in FY14 through FY18 and CPS per-pupil costs relative to per-pupil costs in comparable peer school systems. Please discuss in terms of:

- Regular Education
- Materials and Technology
- Administration
- Pupil services
- Special Education
- Guidance and Counseling

The most significant factors driving PPE costs in FY11 were special education expenditures. For the two previous fiscal years we had experienced downward trends in our special education expenditures; this trend was reflected in our development of the FY2011 CPS budget request of 0% increase, which included a \$300,000 decrease in out of district tuition line items. During FY11, the trend began to reverse, most notably in early childhood special education needs. As these students move through grade levels, and new students enter in earlier grades with similar needs, the initial costs remain while new costs needs enter the system. This trend continued into FY12 and FY13 and is anticipated to be present in fiscal years 2014 to 2018. For regular education our FY11 expenditures increased 2.17%. While this increase was insufficient to meet contractual salary obligations there were offsetting reductions in enrollment driven decreases. Special education costs decreased 4.2% in the FY2011 budget, and as mentioned the trend of declining costs in this area reversed and FY12 Special Education budgets increased 3.27%. The full impact of the increased special education costs was reflected

in the FY2013 budget with a 16.8% increase in the special education program area. Regular education costs increased by 1.8 percent. During these challenging budget years we maintained a strong technology program, but conventional instructional material accounts were reduced by 13.5%. In regard to guidance and counseling we believe the high level of services we provide to our children mitigates the need for more intensive services.

Another significant factor in terms of PPE is the contractually required teaching salary structure of our system in comparison to other districts. The chart below shows the relationship of our teaching salaries to comparable neighboring districts. The data below is the top step/top lane teaching salary for true K8 districts.

		<u>FY2012</u>	<u>FY2013</u>	<u>FY2014</u>	<u>FY2015</u>
Concord Public Schools		\$ 101,940	\$ 103,978	\$ 106,057	\$ 107,912
Lincoln Public Schools	***	\$ 93,999	\$ 95,409	\$ 96,840	
Sudbury Public Schools	***	\$ 93,207			
Average of Comparison Group		\$ 93,603	\$ 95,409	\$ 96,840	
CPS To Group Comparison		8.91%	8.98%	9.52%	

Materials and Technology – we have integrated technology into the classroom to a greater extent than many of our neighboring districts; this is reflected in our PPE. We believe technology competence will be critical to the success of our students as they move into the high school and collegiate levels.

During FY11 we began to see increases in our early childhood classrooms special education needs. For FY12 and FY13 we have experienced growth in our general enrollment, and with that growth an associated special education growth in line with the state average special education percentages.

During FY08 – FY12 there has been a 25% drop in the number of OOD students. In FINCOM meetings we have discussed the drop in numbers but emphasized the nature and complexities of needs presenting in this decrease are driving costs higher.

Question 2. What are your top 3-4 priorities in terms of improved learning/development effectiveness over the next 5 years? What are the desired outcomes? What performance milestones should we expect?

Top priorities over the next five years include increasing the number of K8 students who master critical end of year grade level standards and score proficient/advanced on the Math and English Language Arts (ELA) MCAS, increasing the use of digital tools, Moodle, etextbooks, and 1:1 laptops, increasing students' social and emotional well-being, implementing Common Core Standards, common assessments, and data teams, developing professional collaboration to analyze student work and adjust instructional practices to improve student learning, and adopting the new educator supervision and evaluation model. The outcome benchmarks include the following: 80% K5 mastery of critical grade level standards in ELA and Math, 80% of CMS students earn B- or higher, 90% Adv/Prof. on ELA MCAS at Grades 5 and 8, 80% Adv/Prof on Math MCAS grades 5 and 8, K8 sped students achieve 90% of IEP goals, CMS students use digital tools to produce culminating projects, data teams regularly use protocols for looking at student

work, analyzing data, and adjusting instructional practices, reduction in referrals to the K5 Mental Health team and reported incidences of bullying. (See attached District Goals 2012-13).

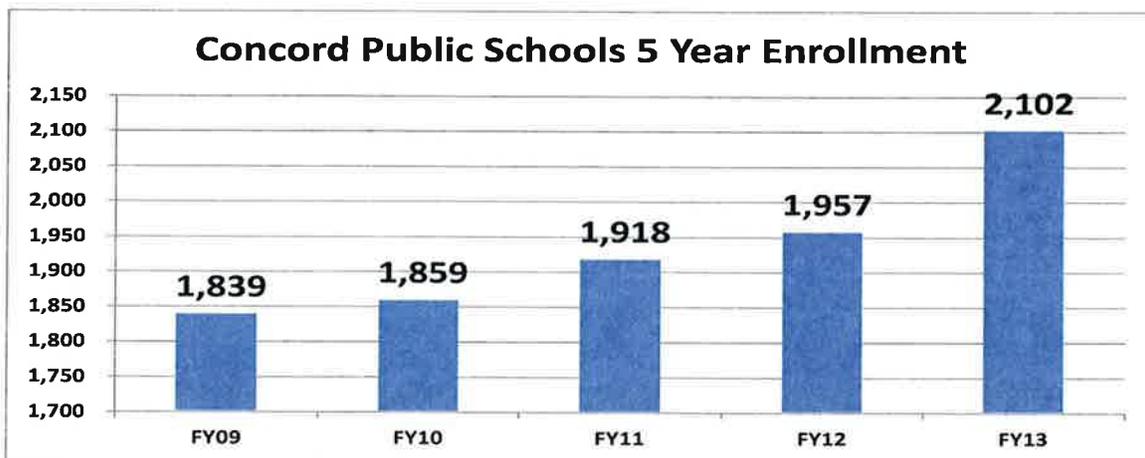
Resources needed include increased levels of staffing, professional development, teacher collaboration time, increased technology tools, and increased administrative technology tools for the supervision and evaluation system.

Question 3. What is the outlook for growth rate in total operating expenditures for CPS over the next five years?

Based on historical spending patterns and currently known collective bargaining agreements CPS operating expenses are anticipated to require 3 -5% funding increases. Variations in state funding levels for circuit breaker reimbursement could negatively affect this projection.

Question 3a. What is the outlook for total enrollment at CPS? For METCO and other non-resident students?

Enrollments at CPS have risen by 184 students in the past two years. About 1/4 of this increase is attributable to the Concord Mews development, whose full impact is yet to be determined. The 5 previous fiscal years and current FY2013 enrollments are below.



The larger portion of the enrollment increase is due to the availability of homes in Concord and the favorable buyer's market and interest rate environment. METCO and non-residents student enrollment is currently projected to remain stable in the future. NESDEC projections which will reflect the increases of the past two year's October 1 actuals are expected to be received in early November. The latest on-hand NESDEC projections are from November, 2011 and are attached.

Question 3b. What is the outlook for Special Education expenditures, out-of-district placements and reimbursements?

With increasing enrollment it is projected that special education student numbers will increase, with a similar percentage to the state average of 17% requiring some level of special education services. We are observing a higher level of need in our early childhood programs that indicate special education services' costs will increase in future years. While out-of-district placements have decreased from 53 in FY2008 to the current 38, the intensity and costs of these placements are substantially higher. Current

placements range in cost from \$34,477 to \$128,708 for CPS. In regard to the circuit breaker reimbursement rate, as the State's finances have stabilized the rates have been increasing and approaching the statutory level of 75% percent for costs above the \$40,516 threshold. The chart below contains the five year history for CPS Out-Of-District Special Education costs.

**OUT OF DISTRICT SPECIAL EDUCATION COSTS
FY08-FY12**

	Total Expenditures	SPED Expenditures	Out of District (OOD) Expenses	OOD % of Total	OOD % of SPED	# of OOD	Circuit Breaker Reimbursement
CPS							
FY08	\$26,417,163	\$6,782,566	\$2,668,150	10.10%	39.34%	53	\$680,802
FY09	\$26,999,599	\$6,366,650	\$2,283,752	8.46%	35.87%	46	\$656,927
FY10	\$27,699,046	\$6,692,766	\$2,035,448	7.35%	30.41%	48	\$302,147
FY11	\$27,699,200	\$7,102,642	\$2,112,465	7.63%	29.74%	40	\$308,085
FY12	\$28,474,200	\$7,343,469	\$2,593,865	9.11%	35.32%	40	\$621,757

Question 3c. What is the outlook for faculty compensation including steps, scales, and lane changes?

The following table summarizes the status of our seven collective bargaining units with more than ten employees. The table also identifies the number of teachers at top step in their respective teacher association.

Collective Bargaining Status

	FY2012	FY2013	FY2014	FY2015	Expiration	Members	Top Step
Concord Teachers Association	0.75%	2.00%	2.00%	1.75%	6.30.15	198	32.9%
All Steps 4%							
Lanes							
B to B15 - 5%							
B15 to Masters 11%							
Beyond Masters approximately 2.5% for each additional 15 graduate credits							
Concord-Carlisle Teachers Association	Steps 1 -16 0.75%	2.25%	2.25%		6.30.14	123	39.5%
Steps 1-15 4%		Step 16 Only 0.75%	0.75%				
B to B15 - 5%							
B15 to Masters 11%							
Beyond Masters approximately 2.5% for each additional 15 graduate credits							
Secretaries Unit	2.00%	2.00%			6.30.13	37	
CPS Building Service Workers	2.25%	2.25%	2.25%	2.25%	6.30.15	15	
CCHS Building Service Workers	2.25%	2.25%	2.25%	2.25%	6.30.15	9	
Bus Drivers Unit - Expired	3.10%				6.30.12	31	
CCHS Tutors	2.00%	2.00%			6.30.13	30	

In the past three years we have seen stabilization in the rate of increases for medical insurance and the impacts of legislative changes have allowed us to reduce our budgetary needs to fund this benefit in the FY2014 budget development process. On a

longer term basis, the inflationary pace of employee benefits has exceeded the rate of salary escalation resulting in a greater level of benefits within total compensation. Looking forward, changes in national policy, a growing awareness of dietary impacts and proactive wellness plans may result in positive cost trends.

The Concord Public Schools do not include OPEB obligations in its operating budget request. The Concord-Carlisle Regional School Districts plan for meeting the OPEB would be to increase the funding level by \$100,000 per year till the Annual Required Contribution (ARC) is reached. However, the current amount in the FY2014 CCRSD request is \$300,000, which is only \$25,000 more than the FY2013 level.

What is the outlook for numbers of faculty FTEs, administrative FTEs, and total FTEs? Please indicate what percentage of your faculty has now achieved the highest step in the pay grade.

Instructional FTE levels will respond to changes in enrollment, and additions or deletions of program. Recent enrollment increases at the K8 level have required additional staff. District administrative FTE levels may need to increase in order to provide responsiveness to an increasingly more complex technology environment, more demanding state reporting, new supervision and evaluation process, HS project administration, and public records requests.

Question 3d. What are the main uncertainties that you face in projecting forward?

Our main uncertainties moving forward are costs associated with enrollment, special education, adequately funding technology, and transportation costs.

Question 3e. How would programs, staffing, faculty levels or information technology plans be affected if the FY14 budget were to be approved (a) with only a 2% increase above the FY13 budget? or (b) with no increase at all over the FY13 budget?

(a) A 2% increase would create a \$611,089 shortfall against projected needs. Of the \$856,754 increase allowed by a 2% increase, \$752,099 would be required for legally binding collective bargaining obligations. The remaining \$104,655 would not address the legal requirements for special education tuitions projected to be required for FY2014; there would be a shortfall of \$209,183 in special education budgets, and a \$210,101 shortfall in funding to address estimated transportation needs. Or, if faculty reductions were used to address the shortfall a reduction in the range of 9 - 13 teaching positions from steps 1 – 4 would be required and class size would increase.

(b) A 0% increase would create a \$1,467,843 shortfall against projected needs. None of the \$752,099 required for legally binding collective bargaining obligations would be available, and funds for binding leases, required tuitions, and enrollment driven staffing would also not be available. This funding shortfall would be nearly equivalent to the funding required for 25.5 teachers on steps 1 – 6 of the pay scale matrix. Class sizes would increase significantly and educational programs would be cut. This would create a significant unemployment liability for the Town of Concord.

Question 4. What level of capital expenditures is planned over the next five years, including transportation services facilities? Please identify what expenditures will be proposed to be financed through the issuance of long-term debt and what expenditures

will be proposed to be financed as capital outlays within the current budget of each year (without debt issuance).

The Town Manager's capital plan for CPS is funded at approximately \$800K for FY14 - 18. This funding level appears adequate for our currently known needs. Projects in the CPS Capital plan are included in the Town Manager's budget who determines the method of financing.

Question 5. Please indicate the amounts in the CPS Capital Needs and CPS Technology Stabilization funds as of September 30, 2012 and any planned uses of or additions to those funds in FY13 or FY14.

The respective stabilization fund balances as of September 30, 2012 are \$75,288.16 for the Technology and \$964,058.21 for the Capital Needs.

Question 6. Please discuss any anticipated changes in the budgeted amounts for transportation services for FY13, the amounts you contemplate for the FY 14 budget and over the next five years.

The chart below is support for an estimate of \$333K of FY2013 unanticipated expenses

FY13 Additional Transportation Costs	Lease Cost	FY13 Cost	FY13 Allocation		FY14	FY14 Allocation		FY15
			CPS	CCRS		CPS	CCRS	
Leasing								
Billerica Facility Lease	\$42,000	\$ 42,000	\$ 25,200	\$ 16,800	\$ 45,000	\$ 27,000	\$ 18,000	\$48,000
Proposed Acton Facility Lease*	\$48,000	\$ 36,000	\$ 21,600	\$ 14,400	\$ 50,400	\$ 30,240	\$ 20,160	\$54,000
Office Trailer with Restroom (46' x 12' - planning number only plus tight tank allowance)		\$ 28,000	\$ 16,800	\$ 11,200	\$ 28,000	\$ 16,800	\$ 11,200	\$29,400
-- FY 13 cost assumes 10/1/12 lease signing								
Associated Labor Costs								
Additional driver time with Acton starting point (6.8 Miles from Townhouse) and with Billerica repair facility.								
ST Rate	-- 2 X .5 hrs X 36 Drivers X \$22.38 X 180 school days =	\$ 145,022						
OT Rate	-- 2 X .5 hrs X 36 Drivers X \$33.57 X 180 school days =	\$ 217,534						
Blended Rate (50% OT/50% ST)		\$ 181,278	\$ 108,767	\$ 72,511.2	\$ 181,278	\$ 108,767	\$ 72,511	
** Used top step of FY12 labor rate -- \$22.38 straight time								
Associated Fuel Costs								
Additional Driver fuel cost with Acton starting point -- 2 gallons a day @ \$3.51 per gallon X 36 buses X 180 days of school								
	2*3.51*36*180=	\$ 45,490	\$ 27,294	\$ 18,196	\$ 45,490	\$ 27,294	\$ 18,196	
Estimated range of cost associated with Acton based operation is \$190K to \$263K for labor and fuel.								
		\$332,768	\$ 199,661	\$ 133,107		\$ 210,101	\$ 140,067	

60 days to sign Acton RFP after due date of August 31, NLT October 30

For fuel, labor and leases due to transportation issues. The \$330K will be allocated on a 60/40 ratio to CPS and CCRSD. The FY2014 budgets include \$350K for transportation expenses. The FY2014 budgets do not include any funding requests for bus replacements.

Question 7. Please report on all off-budget sources of funding, including all receipts, fees, federal, state and other grants for FY12, FY13 (as known to date) and anticipated or planned for FY14, including the finances of our METCO program (inclusive of transportation). Please discuss any changes anticipated in the level, rate or method of determining such receipts, fees and grants.

Please see chart below. Our current anticipation for FY2014 grants is level funding.

DESCRIPTION	FY10 SC Budget	FY11 SC Budget	FY12 Budget	FY13 Adopted Budget	FY14 Planning Budget
<u>GENERAL FUND</u>					
OPERATING BUDGET LEVELS	\$ 27,699,200	\$ 27,699,200	\$ 28,474,200	\$ 29,755,538	\$ 31,223,381
<u>EXTERNAL FUNDS</u>					
FEDERAL GRANTS	906,165	1,057,937	628,658	643,566	643,566
STATE GRANTS-METCO	493,724	476,855	445,535	460,137	460,137
EXTERNAL FUNDS TOTAL	1,399,889	1,534,792	1,074,193	1,103,703	1,103,703

Question 8. Is the current level of capital expenditures sufficient, assuming the continued use of the Concord Middle School's Sanborn and Peabody buildings for another decade or longer?

For the near five to ten year term, a combination of the \$800,000 in the Town Manager's Budget and potential use of CPS Capital Needs stabilization funds is sufficient for currently anticipated needs at the CMS buildings.

Question 9. Please provide an overview for us of any anticipated changes in the criteria CPS uses to measure its performance and cost effectiveness.

No changes are currently anticipated.

Attachments:

- District Goals
- Monthly Enrollments
- NESDEC Projections (November 2011)
- FY2014 CCRSD Planning Budget
- FY2014 CPS Planning Budget
- Preliminary CPS 5 Year Capital Plan

Concord-Carlisle Regional School District
 Concord Public Schools
 District Goals 2012-2013

DISTRICT SMART GOAL: TEACHING & LEARNING

By June 2013, students in grades K – 12 will master critical end of year grade level standards.

Key Actions	Process Benchmarks	Outcome Benchmarks
Implement district core curriculum K – 12 incorporating CCSS in ELA, Math and SS & Science Literacy.	<ul style="list-style-type: none"> Teachers revise K5 progress reports to reflect alignment with the CCSS (Common Core State Standards) in ELA, Math and Literacy in Science & Social Studies. 6-8 teachers collaborate to identify those common core standards that are shared among subject areas 9-12 teachers develop school wide rubrics to assess critical learning outcomes for all students. 	<ul style="list-style-type: none"> K5 Progress reports are aligned with the CCSS Grades 6-8 map of common core standards shared among multiple subject areas Grades 9-12 school-wide rubric are used to assess critical learning outcomes for all students
Implement common assessments in ELA and Math K5 and all subject areas 6-12.	<ul style="list-style-type: none"> Teacher teams analyze summative and formative common assessment data and use the data to adjust practice and identify and/or implement appropriate differentiated interventions 	<ul style="list-style-type: none"> 80% K5 mastery of critical grade level standards in English Language Arts and Math 80% of CMS students earn B- or higher 85% of CCHS students earn 2.0 GPA or higher 90% Advance/Proficient on ELA MCAS at 5, 8, and 10 80% Advance/Proficient on Math MCAS at 5, 8, and 10 Maintain 100% Competency Determination for every graduating member of the Class of 2013
Identify appropriate intervention and adjust instructional practice	<ul style="list-style-type: none"> Establish building based structures (i.e., RTI) to support students not meeting benchmarks. Implement progress-monitoring procedures to track students' progress 	<ul style="list-style-type: none"> K12 SPED students will achieve 90% of the goals on their IEPs Increase GPA of grades 9-12 Boston students by +.2

Concord-Carlisle Regional School District
 Concord Public Schools
 District Goals 2012-2013

DISTRICT SMART GOAL: TEACHING & LEARNING

During the 2012-2013 school year, administrators and teacher leaders will lead all educators and teams to use student assessment data, research and best practices in instruction, assessment and technology to improve student learning.

Key Actions	Process Benchmarks	Outcome Benchmarks
<p>Provide professional development to administrators, department chairs and curriculum specialists in developing and implementing protocols for looking at student work, analyzing data, and adjusting instructional practices.</p>	<p>During administration and faculty meetings, model protocol for looking at student work, analyzing data, and adjusting instructional practices.</p>	<p>Educators and teams routinely use protocols for looking at student work, analyzing data, and adjusting instructional practices.</p>
<p>Technology specialists collaborate with teachers to integrate use of digital tools in daily classroom instruction and assessment.</p> <p>Initiate pilots of one-to-one laptop program in the middle school and high school</p>	<p>Elementary students will increase use of digital tools for informational, narrative and persuasive writing.</p> <p>Students in grades 6-12 will increase their use of digital tools, Moodle and e-textbooks.</p>	<p>Elementary students complete technology project that incorporates online writing and digital story telling.</p> <p>Students in grades 6-12 use digital tools to demonstrate mastery of content standards.</p>

Concord-Carlisle Regional School District
 Concord Public Schools
 District Goals 2012-2013

DISTRICT SMART GOAL: TEACHING & LEARNING

Increase K12 students' social and emotional well-being.

Key Actions	Process Benchmarks	Outcome Benchmarks
<ul style="list-style-type: none"> • K5 Mental Health Team provides coaching to teachers for consistent implementation of Open Circle and Bully Proofing Curricula. • Grade 6-8 implements year 2 of CMS Stands Together • Grades 9-12 implements Advisory Program. 	<ul style="list-style-type: none"> • Elementary teachers collaborate with Mental Health Team to implement Open Circle and Bully Proofing Curricula. • Teachers in grades 6-8 collaborate with guidance counselors and student leaders to provide two days of bullying prevention and intervention programming. • Students' involvement in co-curricular activities will be monitored by their guidance counselors. 	<ul style="list-style-type: none"> • K5, 5% reduction in referrals to the Mental Health Team. • Grades 6-12, 3% reduction in reported incidents of bullying. • Grades 9-12, 90% students participate in at least 1 co-curricular activity each year they attend CCHS. • Grades 9-12, 100% of seniors report a connection to at least 1 adult on the senior exit survey.

Concord-Carlisle Regional School District
 Concord Public Schools
 District Goals 2012-2013

DISTRICT SMART GOAL: HUMAN RESOURCES

By June 2013, implement 100% of the new supervision & evaluation system at CCHS and begin the process at CPS in alignment with state regulations and contract provisions.

Key Actions	Process Benchmarks	Outcome Benchmarks
Implement training for district leadership team.	<ul style="list-style-type: none"> District and CCHS Leadership teams complete DESE Training Modules. Train instructional leadership teams on protocols for examining student work. 	<ul style="list-style-type: none"> District and CCHS evaluators implement new evaluation system. K-8 evaluators have a working knowledge of the new evaluation system.
Assist CCHS principal in implementation of evaluation system.	<ul style="list-style-type: none"> Regularly meets with CCHS Principal to review progress. Participates as a member of the CCHS leadership team. Collaborates with CCTA leadership to implement new evaluation system. 	<ul style="list-style-type: none"> All five stages of the evaluation system are implemented. Co-facilitate joint labor/management committee to continue working on implementation.
Collaborate with the CTA to develop a new supervision & evaluation system based on state regulation.	<ul style="list-style-type: none"> Co-facilitate a joint labor management committee. Promote open and frequent communication. 	<ul style="list-style-type: none"> A new CPS supervision & evaluation system.
Utilize MLP to complement the implementation of the new supervision & evaluation system.	<ul style="list-style-type: none"> Train teachers on all new aspects of MLP. Collaborate with the district administrative team to align professional development to district, school, and individual SMART goals. 	<ul style="list-style-type: none"> Professional development activities are connected to educator, school, and district goals. MLP Team Room is used to support ongoing collaboration and team learning.

Concord-Carlisle Regional School District
 Concord Public Schools
 District Goals 2012-2013

DISTRICT SMART GOAL: FINANCE AND OPERATIONS		
By June 2013, FY14 CPS and CCRSD budgets will be approved at both Concord and Carlisle Town Meetings.		
Key Actions	Process Benchmarks	Outcome Benchmarks
Work with Administrative team to identify FY 14 student learning needs, cost drivers, and additional resources.	<ul style="list-style-type: none"> Develop preliminary budget that minimizes taxpayers demand while providing necessary educational resources. 	<ul style="list-style-type: none"> Preliminary FY 14 budget requests
Work with Concord and Carlisle Finance Committees and School Committees to develop budgets that support the FY14 school district goals and are within levy limits.	<ul style="list-style-type: none"> Prepare Preliminary budget reports for School Committees and Finance Committees. 	<ul style="list-style-type: none"> Preliminary FY14 budget request book
Develop plans to demonstrate impacts of Concord and Carlisle Fin Com guidelines and levy limits.	<ul style="list-style-type: none"> Attend Fin Com meetings in Concord and Carlisle. 	
Present Prelim FY14 budgets to School Committee.	<ul style="list-style-type: none"> School Committee adopts FY 14 budgets. 	<ul style="list-style-type: none"> School Committee adopted FY14 budgets.
Present School Committee adopted FY 14 budgets at Fin Com hearings	<ul style="list-style-type: none"> Town Fin Coms and Selectmen support FY 14 School budgets. 	<ul style="list-style-type: none"> FY 14 budgets approved at both Concord and Carlisle Town Meetings.

Concord-Carlisle Regional School District
 Concord Public Schools
 District Goals 2012-2013

DISTRICT SMART GOAL: FINANCE AND OPERATIONS		
Support the CCHS Building Committee and Building Project Team to complete Construction Documents and maintain construction schedule.		
Key Actions	Process Benchmarks	Outcome Benchmarks
Meet weekly with Project Team and monthly with CCHS Building Committee to review and inform Project scope, budget, and schedule..	<ul style="list-style-type: none"> Assist Project Team with MSBA Final CD submission and 100% CD bid documents 	<ul style="list-style-type: none"> CCHS Project on budget and schedule

Concord-Carlisle Regional School District
 Concord Public Schools
 District Goals 2012-2013

DISTRICT SMART GOAL: FINANCE AND OPERATIONS
 By June 2013, assist School Committee in determining long term solution for Transportation Services in FY14.

Key Actions	Process Benchmarks	Outcome Benchmarks
Work with SC Transportation Advisory Committee to identify viable options for Transportation services for CPS and CCRSD.	<ul style="list-style-type: none"> Prepare financial and operational analysis of Transportation options for the SC Transportation Advisory Committee 	<ul style="list-style-type: none"> School Committee determines long term solution for Transportation services.

Monthly Enrollments
10/1/2012 - 6/1/2013

	Oct. 1, 2011 Enrollment with Current K-5 Ratios	K-5 Ratios 2011-2012		Oct. 1 2011	Oct. 1 2012	Nov. 1 2012	Dec. 1 2012	Jan. 1 2013	Feb. 1 2013	Mar. 1 2013	Apr. 1 2013	May 1 2013	June 1 2013	K-5 Ratios 2012 - 2013	
		2011-2012	10/01/11											2012-2013	10/01/12
CCHS															
9				294											
10				300											
11				306											
12				308											
TOTAL CCHS:				1209											
Peabody & Sanborn															
6				218											
7				209											
8				208											
TOTAL PEABODY & SANBORN:				633											
Alcott															
K															
1				53											22.0
2				62											20.7
3				74											18.3
4				83											20.0
5				79											22.3
TOTAL ALCOTT:				63											20.3
				414											22
Thoreau															
K															
1				73											21.0
2				75											19.3
3				85											20.0
4				55											19.0
5				85											18.4
TOTAL THOREAU:				448											21.3
				473											24
Willard															
K															
1				74											19.0
2				94											19.3
3				87											20.6
4				65											22.3
5				67											15.5
TOTAL WILLARD:				75											24.0
				462											24

Monthly Enrollments
10/1/2012 - 6/1/2013

	Oct. 1, 2011 Enrollment with Current K-5 Ratios	K-5 Ratios 2011-2012	Oct. 1 2011	Oct. 1 2012	Nov. 1 2012	Dec. 1 2012	Jan. 1 2013	Feb. 1 2013	Mar. 1 2013	Apr. 1 2013	May 1 2013	June 1 2013	K-5 Ratios 2012 - 2013
TOTAL K-12			1324	1403	1403	1403	1403	1403	1403	1403	1403	1403	1403
Elementary - Grades K-5			1124	1177	1177	1177	1177	1177	1177	1177	1177	1177	1177
Elementary - Grades 1-5			633	699	699	699	699	699	699	699	699	699	699
Middle - Grades 6-8			1957	2102	2102	2102	2102	2102	2102	2102	2102	2102	2102
CPS - Grades K-8			1209	1216	1216	1216	1216	1216	1216	1216	1216	1216	1216
CCHS - Grades 9-12			3166	3318	3318	3318	3318	3318	3318	3318	3318	3318	3318
TOTAL K-12: (Not including OOD SPED)													
Worksheet													
Kindergarten			200	226	226	226	226	226	226	226	226	226	226
1			231	216	216	216	216	216	216	216	216	216	216
2			236	256	256	256	256	256	256	256	256	256	256
3			233	245	245	245	245	245	245	245	245	245	245
4			201	243	243	243	243	243	243	243	243	243	243
5			223	217	217	217	217	217	217	217	217	217	217
TOTAL Grades K-5:			1324	1403	1403	1403	1403	1403	1403	1403	1403	1403	1403
Grade 6			218	243	243	243	243	243	243	243	243	243	243
Grade 7			209	234	234	234	234	234	234	234	234	234	234
Grade 8			206	222	222	222	222	222	222	222	222	222	222
TOTAL Grades 6-8:			633	699	699	699	699	699	699	699	699	699	699
TOTAL Grades K-8:			1957	2102	2102	2102	2102	2102	2102	2102	2102	2102	2102
Grade 9			294	309	309	309	309	309	309	309	309	309	309
Grade 10			300	295	295	295	295	295	295	295	295	295	295
Grade 11			306	302	302	302	302	302	302	302	302	302	302
Grade 12			309	310	310	310	310	310	310	310	310	310	310
TOTAL Grades 9-12:			1209	1216	1216	1216	1216	1216	1216	1216	1216	1216	1216
TOTAL K-12: (Not including OOD SPED)			3166	3318	3318	3318	3318	3318	3318	3318	3318	3318	3318

Monthly Enrollments
10/1/2012 - 6/1/2013

	Oct. 1, 2011 Enrollment with Current K-5 Ratios	K-5 Ratios 2011-2012	Oct. 1 2011	Oct. 1 2012	Nov. 1 2012	Dec. 1 2012	Jan. 1 2013	Feb. 1 2013	Mar. 1 2013	Apr. 1 2013	May 1 2013	June 1 2013	K-5 Ratios 2012 - 2013
Worksheet													
SPECIAL EDUCATION OOD													
CPS OOD K-8			35	33									
CCHS OOD			38	40									
TOTAL K-12 OOD: (Not in K-12 Total)			73	73	0	0	0	0	0	0	0	0	0
Pre-School OOD: (Not in K-12 Total)			2	0	0	0	0	0	0	0	0	0	0
METCO STUDENTS													
CCHS			69	64									
Middle School			21	26									
Alcott			30	29									
Thoreau			25	24									
Willard			22	22									
TOTAL K-12: METCO Students:			167	165	0	0	0	0	0	0	0	0	0
NON-TUITION-OUT OF TOWN STUDENTS													
CCHS--Carlisle Students			319	310									
CCHS--Staff Students			10	10									
TOTAL CCHS-Out of Town Students:			329	320	0	0	0	0	0	0	0	0	0
Middle School-Staff Students			6	7									
Alcott-Staff Students			3	7									
Thoreau-Staff Students			7	5									
Willard-Staff Students			18	14									
TOTAL K-8 - Out of Town Students:			34	33	0	0	0	0	0	0	0	0	0
CONCORD STUDENTS													
CCHS			811	832									
Peabody & Sanborn			606	666									
Alcott			381	415									
Thoreau			416	444									
Willard			422	443									
TOTAL CONCORD Students:			2636	2800	0	0	0	0	0	0	0	0	0

Concord-Carlisle HS Historical Enrollment

School District:

Concord-Carlisle High School with METCO

10/5/2011

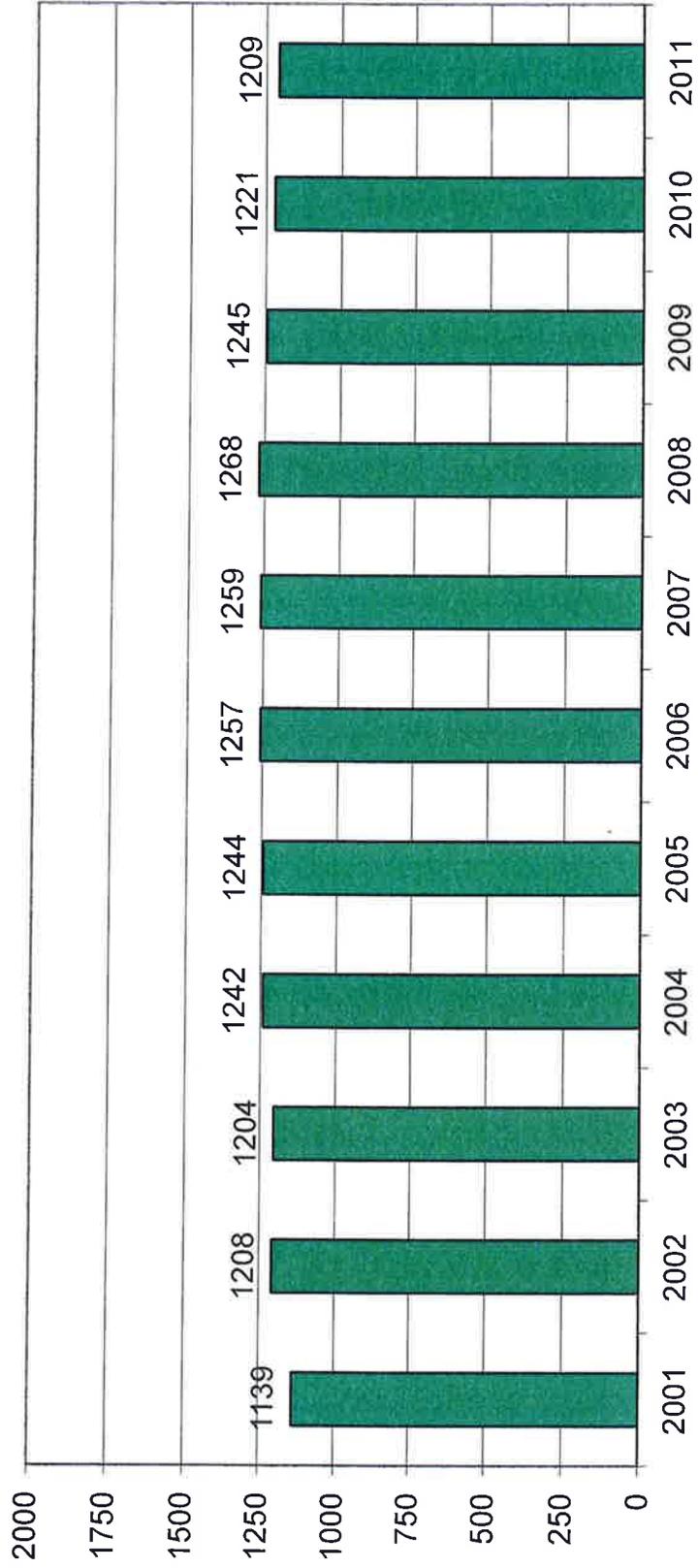
Historical Enrollment By Grade																			
Birth Year	Births	School Year	PK	K	1	2	3	4	5	6	7	8	9	10	11	12	UNGR	9-12	9-12
1996	220	2001-02	0	0	0	0	0	0	0	0	0	0	307	276	295	261	0	1139	1139
1997	224	2002-03	0	0	0	0	0	0	0	0	0	0	328	309	286	285	0	1208	1208
1998	213	2003-04	0	0	0	0	0	0	0	0	0	0	301	325	303	275	0	1204	1204
1999	222	2004-05	0	0	0	0	0	0	0	0	0	0	311	311	316	304	0	1242	1242
2000	223	2005-06	0	0	0	0	0	0	0	0	0	0	321	304	305	314	0	1244	1244
2001	207	2006-07	0	0	0	0	0	0	0	0	0	0	337	321	299	300	0	1257	1257
2002	198	2007-08	0	0	0	0	0	0	0	0	0	0	304	331	326	298	0	1259	1259
2003	162	2008-09	0	0	0	0	0	0	0	0	0	0	312	297	329	330	0	1268	1268
2004	205	2009-10	0	0	0	0	0	0	0	0	0	0	302	312	297	334	0	1245	1245
2005	131	2010-11	0	0	0	0	0	0	0	0	0	0	297	310	313	301	0	1221	1221
2006	154	2011-12	0	0	0	0	0	0	0	0	0	0	294	300	306	309	0	1209	1209

Historical Enrollment in Grade Combinations									
Year	PK-5	K-5	K-6	K-8	5-8	6-8	7-8	7-12	9-12
2001-02	0	0	0	0	0	0	0	0	1139
2002-03	0	0	0	0	0	0	0	0	1208
2003-04	0	0	0	0	0	0	0	0	1204
2004-05	0	0	0	0	0	0	0	0	1242
2005-06	0	0	0	0	0	0	0	0	1244
2006-07	0	0	0	0	0	0	0	0	1257
2007-08	0	0	0	0	0	0	0	0	1259
2008-09	0	0	0	0	0	0	0	0	1268
2009-10	0	0	0	0	0	0	0	0	1245
2010-11	0	0	0	0	0	0	0	0	1221
2011-12	0	0	0	0	0	0	0	0	1209

Historical Percentage Changes			
Year	9-12	Diff.	%
2001-02	1139	0	0.0%
2002-03	1208	69	6.1%
2003-04	1204	-4	-0.3%
2004-05	1242	38	3.2%
2005-06	1244	2	0.2%
2006-07	1257	13	1.0%
2007-08	1259	2	0.2%
2008-09	1268	9	0.7%
2009-10	1245	-23	-1.8%
2010-11	1221	-24	-1.9%
2011-12	1209	-12	-1.0%
Gr. 9-12 Change		70	6.1%

Concord-Carlisle HS Historical Enrollment

Grades 9-12, 2001-2011



Concord-Carlisle HS Projected Enrollment

School District:

Concord-Carlisle High School with METCO

10/5/2011

Enrollment Projections By Grade*																			
Birth Year	Births	School Year	PK	K	1	2	3	4	5	6	7	8	9	10	11	12	UNGR	9-12	9-12
2006	154	2011-12	0	0	0	0	0	0	0	0	0	0	294	300	306	309	0	1209	1209
2007	129	2012-13	15	0	0	0	0	0	0	0	0	0	301	297	300	308	0	1206	1206
2008	136	2013-14	16	0	0	0	0	0	0	0	0	0	314	304	297	302	0	1217	1217
2009	148	2014-15	17	0	0	0	0	0	0	0	0	0	301	317	304	298	0	1220	1220
2010	140	(est.) 2015-16	18	0	0	0	0	0	0	0	0	0	311	304	317	306	0	1238	1238
2011	141	(est.) 2016-17	19	0	0	0	0	0	0	0	0	0	291	314	304	319	0	1228	1228
2012	139	(est.) 2017-18	20	0	0	0	0	0	0	0	0	0	313	294	314	306	0	1227	1227
2013	141	(est.) 2018-19	21	0	0	0	0	0	0	0	0	0	331	316	294	316	0	1257	1257
2014	142	(est.) 2019-20	22	0	0	0	0	0	0	0	0	0	321	334	316	295	0	1266	1266
2015	140	(est.) 2020-21	23	0	0	0	0	0	0	0	0	0	306	324	334	318	0	1282	1282
2016	141	(est.) 2021-22	24	0	0	0	0	0	0	0	0	0	261	309	324	336	0	1230	1230

*Projections should be updated on an annual basis.

Based on an estimate of births

Based on children already born

Based on students already enrolled

Projected Enrollment in Grade Combinations*									
Year	PK-5	K-5	K-6	K-8	5-8	6-8	7-8	7-12	9-12
2011-12	0	0	0	0	0	0	0	0	1209
2012-13	0	0	0	0	0	0	0	0	1206
2013-14	0	0	0	0	0	0	0	0	1217
2014-15	0	0	0	0	0	0	0	0	1220
2015-16	0	0	0	0	0	0	0	0	1238
2016-17	0	0	0	0	0	0	0	0	1228
2017-18	0	0	0	0	0	0	0	0	1227
2018-19	0	0	0	0	0	0	0	0	1257
2019-20	0	0	0	0	0	0	0	0	1266
2020-21	0	0	0	0	0	0	0	0	1282
2021-22	0	0	0	0	0	0	0	0	1230

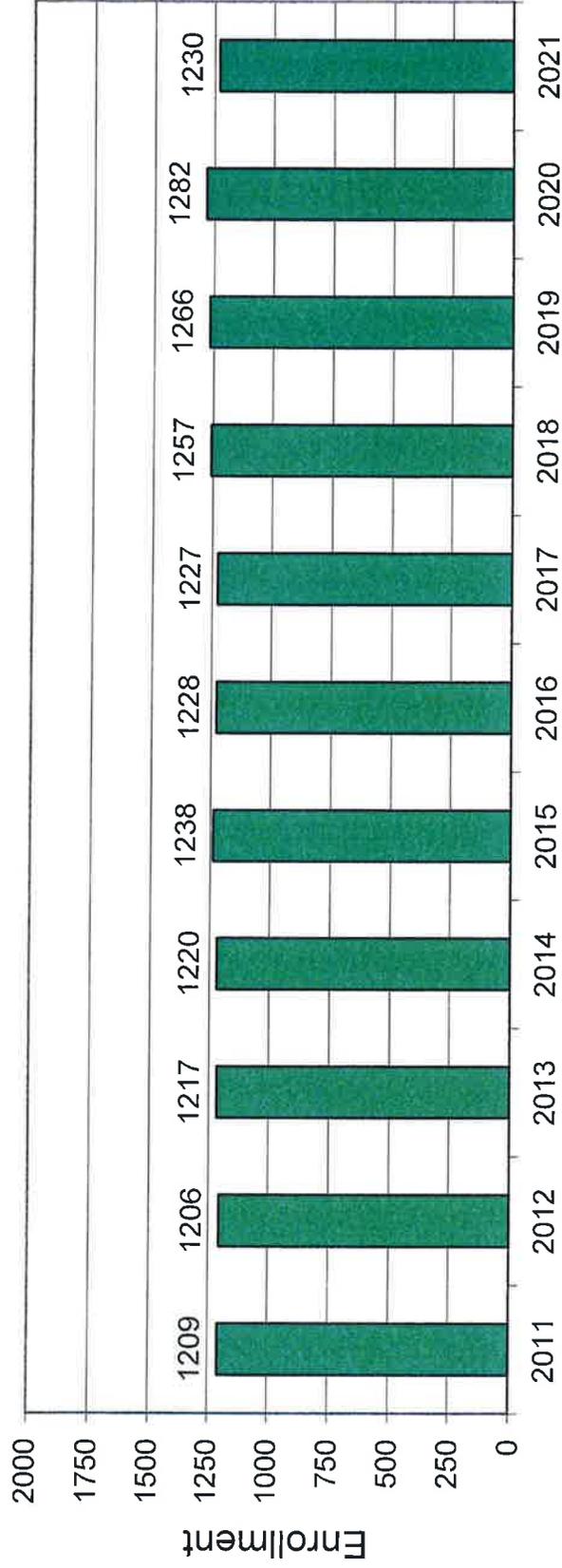
See "Reliability of Enrollment Projections" section of accompanying letter. Projections are more reliable for Years 1-5 in the future than for Years 6 and beyond.

Projected Percentage Changes			
Years	9-12	Diff.	%
2011-12	1209	0	0.0%
2012-13	1206	-3	-0.2%
2013-14	1217	11	0.9%
2014-15	1220	3	0.2%
2015-16	1238	18	1.5%
2016-17	1228	-10	-0.8%
2017-18	1227	-1	-0.1%
2018-19	1257	30	2.4%
2019-20	1266	9	0.7%
2020-21	1282	16	1.3%
2021-22	1230	-52	-4.1%
9-12 Change		21	1.7%



Concord-Carlisle HS Projected Enrollment

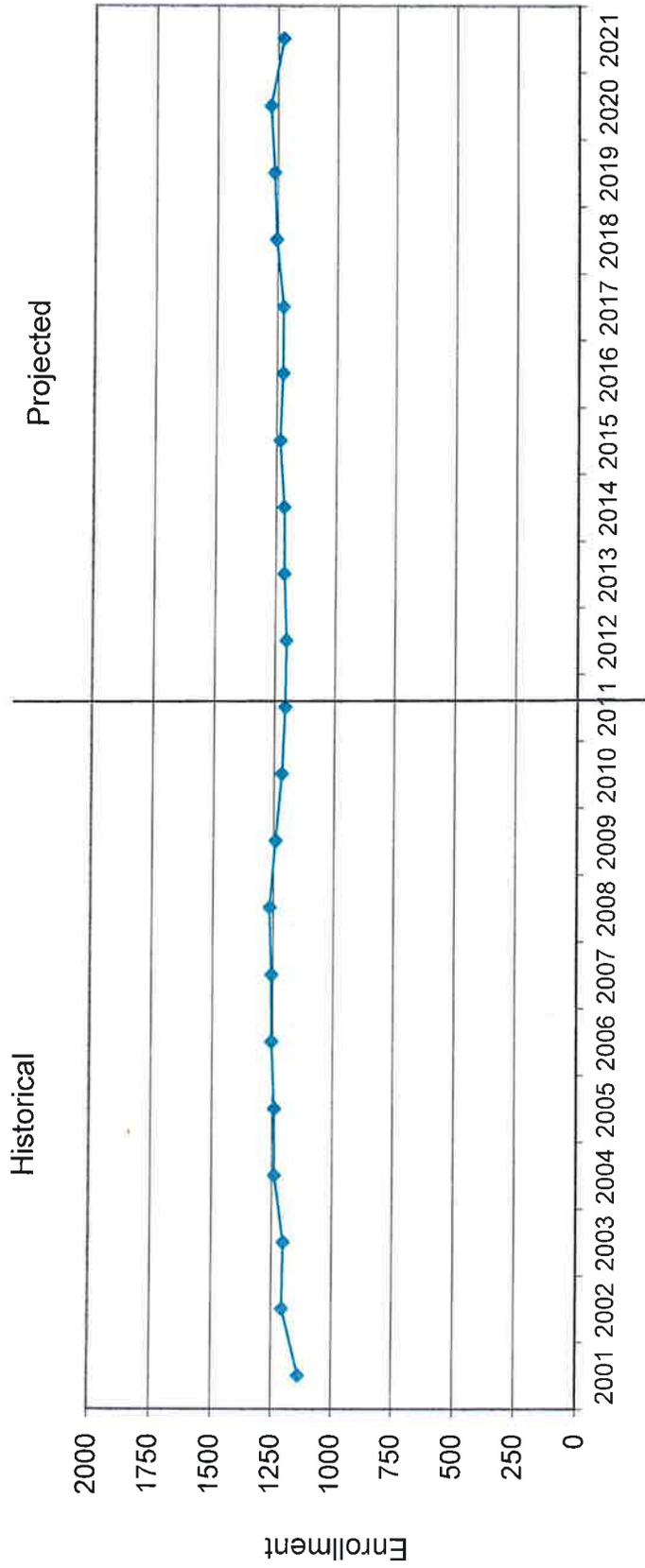
Grades 9-12 To 2021 Based On Data Through School Year 2011-12





Concord-Carlisle HS Historical & Projected Enrollment

Grades 9-12, 2001-2021



**Projected Distribution of Concord and Carlisle Residents at CCHS
Based upon NESDEC Projections October 4, 2011**

School Year	Gr. 9-12 Enrollment	Resident Enrollment	Concord Residents	Concord %	Carlisle Residents	Carlisle %
2011-12	1209	1130	811	71.77%	319	28.23%
2012-13	1206	1126	803	71.31%	323	28.69%
2013-14	1217	1143	816	71.39%	327	28.61%
2014-15	1220	1153	825	71.55%	328	28.45%
2015-16	1238	1177	840	71.37%	337	28.63%
2016-17	1228	1167	840	71.98%	327	28.02%
2017-18	1227	1164	862	74.05%	302	25.95%
2018-19	1257	1192	889	74.58%	303	25.42%
2019-20	1266	1201	921	76.69%	280	23.31%
2020-21	1282	1214	948	78.09%	266	21.91%
2021-22	1230	1164	899	77.23%	265	22.77%

CONCORD-CARLISLE REGIONAL SCHOOL DISTRICT
FY2014 PLANNING BUDGET
CONCORD FINANCE COMMITTEE

October 11, 2012

DESCRIPTION	FY10 SC Budget	FY11 SC Budget	FY12 SC Budget	FY13 SC Adopted Budget	FY14 Planning - Operating Budget-
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SOURCES OF REVENUE

LOCAL SOURCES					
ASSESSMENTS				\$ 21,346,452	\$ 23,594,945
EXCESS & DEFICIENCY				580,000	580,000
INVESTMENT INCOME				15,000	15,000
MISCELLANEOUS INCOME				5,000	5,000
STATE SOURCES (DOE)					
CHAPTER 70				1,696,884	1,836,274
REGIONAL TRANSPORTATION AID				256,142	327,264
CHARTER TUITION REIMBURSEMENTS				15,673	43,693
OTHER STATE SOURCES (MSBA)					
SBAB REIMBURSEMENT				288,950	288,950
TOTAL				\$ 24,204,101	\$ 26,691,126

PROJECTED USES OF REVENUE

SALARIES	\$ 15,071,039	\$ 15,833,348
NON-SALARIES	\$ 7,658,312	\$ 8,438,639
DEBT SERVICE	\$ 643,036	\$ 2,419,139
OPEB LIABILITY	\$ 275,000	\$ 300,000
TOTAL	\$ 23,647,387	\$ 26,991,126

CONCORD-CARLISLE REGIONAL SCHOOL DISTRICT
FY2014 PLANNING BUDGET
CONCORD FINANCE COMMITTEE

October 11, 2012

DESCRIPTION	FY10 SC Budget	FY11 SC Budget	FY12 SC Budget	FY13 SC Adopted Budget	FY14 Planning - Operating Budget-
-------------	-------------------	-------------------	-------------------	------------------------------	---

MAJOR ESCALATION/COST DRIVERS

	<u>COST</u>		<u>COST</u>		<u>COST</u>
STEPS	\$	221,850			221,850
LANES	\$	45,000			45,000
SCALE %	\$	271,178			271,178
OPEB (\$300,000 Reserve - \$25,000 Net Increase)	\$	25,000			25,000
OTHER ESCALATION					275,000
-- Textbooks & Art Consumables			23,327		
-- Capital Outlay			10,000		
-- Sped Transportation & State Assessments			72,037		
-- Tutor/Aide Salary Escalation			101,285		
-- Custodians, Bus Drivers, Maintenance, Clerical - CBU Escalation			44,693		
-- Electricity			10,000		
-- Coaches Salaries			7,744		
-- Special Education S & M			5,914		
	\$	<u>275,000</u>			
TUITIONS	\$				(471,020)
RETIREMENT	\$				71,089
NATURAL GAS	\$				(45,500)
TRANSPORTATION	\$				84,673
LEGAL	\$				70,000
TECHNOLOGY	\$				177,831
INSURANCE (Health & UE)	\$				(100,500)
TOTAL	\$	<u>550,000</u>			<u>624,600</u>

**CONCORD-CARLISLE REGIONAL SCHOOL DISTRICT
 FY2014 PLANNING BUDGET
 CONCORD FINANCE COMMITTEE**

October 11, 2012

DESCRIPTION	FY10 SC Budget	FY11 SC Budget	FY12 SC Budget	FY13 SC Adopted Budget	FY14 Planning - Operating Budget-
-------------	-------------------	-------------------	-------------------	------------------------------	---

GENERAL FUNDS

TOTAL GENERAL FUND BUDGET LEVELS	22,357,071	23,498,427	23,981,012	24,290,423	26,691,126
- less debt service	1,038,831	1,124,235	747,738	643,036	2,419,139
GENERAL FUND OPERATING BUDGET LEVEL	21,318,240	22,374,192	23,233,274	23,647,387	24,271,987

EXTERNAL FUNDS

FEDERAL GRANTS	617,875	754,197	385,366	378,738	378,738
STATE GRANTS-METCO	423,620	380,669	386,933	375,290	375,290
COMMUNITY CHEST	24,000	24,000	15,000	15,000	15,000
EXTERNAL FUNDS TOTAL	1,065,495	1,158,866	787,299	769,028	769,028
ALL FUNDS TOTAL	23,422,566	24,657,293	24,768,311	25,059,451	27,460,154

EXTERNAL FUNDS AS % OF GRAND TOTAL 4.5% 4.7% 3.2% 3.1% 2.8%

CONCORD-CARLISLE REGIONAL SCHOOL DISTRICT
FY2014 PLANNING BUDGET
CONCORD FINANCE COMMITTEE
October 11, 2012

ACCOUNT TITLE	FY12 ADOPTED BUDGET	FY13 PROPOSED BUDGET	FY14 PLANNING BUDGET	FY14 - FY13 CHANGE	FY 14 / FY 13 BUDGET
REGULAR EDUCATION	\$ 10,700,589	\$ 11,067,037	\$ 11,642,146	575,109	5.20%
SPECIAL EDUCATION	\$ 5,525,903	\$ 5,235,731	\$ 4,863,490	(372,241)	-7.11%
ADMINISTRATION	\$ 1,323,231	\$ 1,335,891	\$ 1,434,327	98,436	7.37%
OPERATIONS	\$ 2,936,312	\$ 3,136,861	\$ 3,434,627	297,766	9.49%
FIXED COSTS	\$ 3,746,163	\$ 3,514,903	\$ 5,316,536	1,801,633	51.26%
TOTAL BUDGET	\$ 24,232,197	\$ 24,290,423	\$ 26,691,126	2,400,703	9.88%
-- Less Debt Service	\$ 757,156	\$ 643,036	\$ 2,419,139	276.21%	
OPERATING BUDGET	\$ 23,475,041	\$ 23,647,387	\$ 24,271,987	624,600	2.64%

**CONCORD-CARLISLE REGIONAL SCHOOL DISTRICT
FY14 PLANNING BUDGET
CONCORD FINANCE COMMITTEE**
October 11, 2012

	FY11 CCSC 12.8.9 Adopted Budget	FY12 CCSC 12.14.10 Adopted Budget	FY13 CCSC 12.13.11 Adopted Budget	FY14 CCRSD Planning Budget	Change
<u>Concord-Carlisle Regional High School</u>					
Operations	\$ 22,274,193	23,233,274	23,647,387	24,271,987	624,600
Excluded Debt Service	1,123,110	747,738	643,036 *	2,419,139	
Total Budget	23,497,303	23,981,012	24,290,423	26,691,126	
Financing Sources					
State Aid - Chapter 70	1,698,199	1,598,989	1,696,884	1,836,274	53,068
State Aid - MSBA (Excluded Debt)	288,950	288,950	288,950	288,950	0
State Aid -					
-- Regional Transportation	149,612	229,933	256,142	327,264	71,122
-- Charter Tuition Reimbursement	15,018	1,625	15,673	43,693	28,020
-- Charter Facility Reimbursement	0	0	0	0	
District Funds					
-- Excess & Deficiency	405,000	405,000	580,000	580,000	
-- Investment Income	15,000	15,000	15,000	15,000	
-- Miscellaneous Income	5,000	5,000	5,000	5,000	
Assessments to Member Towns	2,576,780	2,544,497	2,857,649	3,096,181	
Total Financing Sources	20,920,524	21,436,515	21,432,774	23,594,945	2,400,703
Total Financing Sources	23,497,303	23,981,012	24,290,423	26,691,126	
<u>Assessments</u>					
<i>Concord</i>					
Within the levy limit	69.73%	70.39%	71.77%	72.85%	
Excluded debt service	14,006,221	14,766,222	15,128,174	15,637,075	570,854
	581,660	322,941	254,128	1,551,843	1,297,715
<i>Carlisle</i>					
Within the levy limit	30.27%	29.67%	28.23%	27.15%	
Excluded debt service	6,080,142	6,211,505	5,950,514	5,827,681	(98,464)
	252,500	135,847	99,958	578,346	478,388
Total Assessments	6,332,642	6,347,352	6,050,472	6,406,027	
Total Assessments	20,920,523	21,436,515	21,432,774	23,594,945	

	FY13	FY14 Rates Impact	FY14 Assessment Shift Impact in FY13 Dollars
	71.77%	72.85%	
\$	15,066,221 \$	15,292,939 \$	226,718
\$	254,128 \$	257,952 \$	3,824
\$	28.23%	27.15%	230,542
\$	5,926,145 \$	5,699,427 \$	(226,718)
\$	99,958 \$	96,134 \$	(3,824)
\$	6,026,103 \$	5,795,561 \$	(230,542)

* Preliminary Estimated Debt Service

ENROLLMENT RETURNS

CONCORD-CARLISLE REGIONAL HIGH SCHOOL DATE: October 1 2012

	Town of Concord	Town of Carlisle	Tuition Metco	Students State Wards	Out of Town	Non- Tuition Out of Town	Total
Grade 9	217	77	12	-	-	3	309
Grade 10	204	70	18	-	-	3	295
Grade 11	210	72	19	-	-	1	302
Grade 12	201	91	15	-	-	4	310
TOTALS	832	310	64	--		10	1216

Entries and Withdrawals:

Date	Name	Grade	Town	Action	Reason
------	------	-------	------	--------	--------

FY2014 Assessment Ratio – Official 10/1/2012

$$832 + 310 = 1,142$$

$$832 / 1,142 = 72.85\% \text{ Concord}$$

$$310 / 1,142 = 27.15\% \text{ Carlisle}$$

**CONCORD PUBLIC SCHOOLS
 FY2014 PLANNING BUDGET
 CONCORD FINANCE COMMITTEE
 October 11, 2012**

DESCRIPTION	FY10 SC Budget	FY11 SC Budget	FY12 Budget	FY13 Adopted Budget	FY14 Planning Budget
TOTALS	\$ 27,699,200	\$ 27,699,200	\$ 28,474,200	\$ 29,755,538	\$ 31,223,381
CHANGE					
5 Year Operating Average Increase	1.8%	0.0%	2.8%	4.5%	4.9%
					2.8%
SALARIES	21,571,349	22,123,734	22,949,270	23,575,871	24,686,846
NON-SALARIES	6,127,851	5,575,466	5,524,930	6,179,667	6,536,535
FUNDING IMPACT		\$ -	\$ 775,000	\$ 1,281,338	\$ 1,467,843
MAJOR ESCALATION/COST DRIVERS					\$ (1,467,843)
ACCOMMODATED NEEDS					
TOTAL PRELIMINARY NEEDS					\$ (1,467,843)
UNFUNDED AMOUNTS					\$ 0
ESCALATION/COST DRIVERS					
					FY2014
STEPS					\$ 366,769
LANES					60,000
SCALE %					325,329
TRANSPORTATION - (Fuel, Labor, Leases)					210,101
SPECIAL EDUCATION TUITIONS					313,838
ENROLLMENT DRIVEN STAFFING (4.6 Teaching FTEs)					191,806
TOTAL					\$ 1,467,843

**CONCORD PUBLIC SCHOOLS
 FY2014 PLANNING BUDGET
 CONCORD FINANCE COMMITTEE
 October 11, 2012**

<u>GENERAL FUND</u>					
<u>OPERATING BUDGET LEVELS</u>					
	\$ 27,699,200	\$ 27,699,200	\$ 28,474,200	\$ 29,755,538	\$ 31,223,381
<u>EXTERNAL FUNDS</u>					
FEDERAL GRANTS	906,165	1,057,937	628,658	643,566	643,566
STATE GRANTS-METCO	493,724	476,855	445,535	460,137	460,137
EXTERNAL FUNDS TOTAL	1,399,889	1,534,792	1,074,193	1,103,703	1,103,703
ALL FUNDS TOTAL	29,099,089	29,233,992	29,548,393	30,859,241	32,327,084
EXTERNAL FUNDS AS % OF GRAND TOTAL	4.81%	5.25%	3.64%	3.58%	3.41%

**CONCORD PUBLIC SCHOOLS
 FY2014 PLANNING BUDGET
 CONCORD FINANCE COMMITTEE
 October 11, 2012**

	FY2012	FY2013	FY2014		
	Budget	Adopted Budget	Planning Budget	FY14 - FY13	FY14 / FY13
REGULAR EDUCATION	15,370,754	15,647,480	16,610,076	962,596	6.2%
SPECIAL EDUCATION	6,672,579	7,795,828	8,410,442	614,614	7.9%
OPERATIONS	4,309,273	4,213,614	4,092,504	(121,110)	-2.9%
ADMINISTRATION	2,034,647	2,033,670	2,059,559	25,889	1.3%
FIXED COSTS	86,946	64,946	50,800	(14,146)	-21.8%
TOTAL	28,474,200	29,755,538	31,223,381	1,467,843	4.9%

**Concord Public Schools
FY14 - FY18
Preliminary Capital Needs**

Project Description	FY14	FY15	FY16	FY17	FY18	Comments / Building Total
Alcott						
Replacement of DX Chilling				250,000	100,000	
Classroom Refurbishing	50,000	25,000				
Parking Area Sealing & Relining	20,000	20,000				
Total Alcott	70,000	45,000	0	250,000	100,000	\$465,000
Thoreau						
Replacement of DX Chilling			125,000	125,000	100,000	
Classroom & Hall Painting	50,000	25,000				
Parking Area Sealing & Relining	20,000	25,000				
Total Thoreau	70,000	50,000	125,000	125,000	100,000	\$470,000
Peabody Building						
Roof replacement	240,000					
General flooring replacement						
Replacement of HVAC controls and unit ventilator throughout school-desin phase followed by construction	165,000	185,000				Need Updated Gate Estimates & Conditions Report Wear and tear of flooring HVAC systems starting to fail due to age of equipment.
Electrical upgrade	50,000					For computer technology.
Replace existing ventilation units and piping			320,000	300,000		Replace due to age of equipment.
Domestic water piping replacement		150,000	150,000			Replacement due to age of piping in crawl spaces.
Electrical power upgrade for technology	100,000					Lack of electrical power for increased demand for power.
Total Peabody	\$555,000	\$335,000	\$470,000	\$300,000	\$0	\$1,660,000
Sanborn Building						
Asbestos abatement / classrooms						VAT tile should be abated as possible. This request for classrooms where asbestos tile is covered by degraded carpets.
Auditorium renovation (Phase 1)						Carpeting, Chairs, Stage Upgrades
Roof replacement					700,000	Need Updated Gate Estimates
HVAC univert replacement		125,000	125,000	125,000		
Electrical upgrade	50,000					
Fire alarm detection	50,000	25,000				On-going Fire Department codes
Domestic water piping replacement		220,000	80,000			Replacement of old piping
Total Sanborn	\$100,000	\$370,000	\$205,000	\$125,000	\$700,000	\$1,500,000
Ripley Administration Building						
Replace air handlers/AC (elec/mech, Design FY10)						Replacement due to age of equipment
Ripley Conference Rooms						
Total Ripley	\$0	\$0	\$0	\$0	\$0	\$0
Yearly Totals	\$795,000	\$800,000	\$800,000	\$800,000	\$900,000	\$4,095,000



Concord-Carlisle High School

500 Walden Street, Concord, Massachusetts 01742-3699

Phone: (978) 318-1400

Fax: (978) 318-1435

To: Principal Badalament and the Concord Carlisle Regional School Committee

From: Kimberly Magee, Social Studies, CCHS

Date: September 26, 2012

Re: Approval for overnight, out-of-state student trip

I am seeking approval for an educational expedition to Bolivia next summer (2013) for ten to sixteen Concord-Carlisle students with an organization called World Challenge. World Challenge specializes in leadership and skills development for young people, using an expedition to the developing world to facilitate those goals. Last summer, I traveled to Tanzania with World Challenge and ten Concord-Carlisle students. I was impressed with the World Challenge's organizational focus on safety and leadership development and awed by the growth in the students in just four weeks. As a teacher, I am excited at the possibility of offering this opportunity to another team of CCHS students in 2013.

WORLD CHALLENGE

Part of TUI Travel PLC, the world's largest travel provider, World Challenge has been running expeditions for high school students since 1987. With World Challenge students don't just sign up for a trip; education through experience is the heart of the World Challenge philosophy. While on expedition, students will step into leadership roles and become the leaders in managing the logistics and activities of their expedition, including deciding on and scheduling transportation and accommodation, planning and preparing meals, and planning and managing a budget. Through these experiences, students learn vital life and leadership skills while engaging in meaningful physical challenge and cultural exchange. Although the students take the lead on World Challenge expeditions, safety is the top priority of the World Challenge organization. A qualified Expedition Leader will accompany the team and school leader on expedition. In addition, the team is supported by the most up-to-date travel technology, an on-call In-Country Agent and the 24-hour World Challenge Operations Center.

TRIP DETAILS

Team: World Challenge will support a team of ten to sixteen students, with one Teacher Leader and one Expedition Leader. The Teacher Leader for the trip is Kimberly Magee from the CCHS Social Studies department. Kim accompanied ten CCHS students on a World Challenge trip to Tanzania in the summer of 2012. The Expedition Leader for the trip will be Chris Smith. Chris has extensive experience with World Challenge, in developing world travel, wilderness guiding and outdoor education. Chris accompanied the CCHS team to Tanzania in 2012. If approved, the CCHS trip to Bolivia in 2013 will be Chris' tenth World Challenge expedition.

Cost: The estimated cost for a three-week trip is \$4795. The cost of the expedition includes airfare, all in-country costs, facilitated planning meetings and trainings by World Challenge, team equipment provided by World Challenge and travel insurance covering all medical costs while on expedition. The team may engage in fundraising activities to lower the cost of the trip for all students.

Dates: Tentative departure on June 26, 2013, with return between July 17-20, 2013.

ITINERARY

The itinerary for the CCHS trip to Bolivia will not be set until the trip is approved and a team has been selected. However, the following information provides a brief overview of some of the options and opportunities that await students in Bolivia, based upon previous World Challenge trips to the country.

Acclimatization Phase: Each World Challenge expedition consists of four phases. The first phase, the Acclimatization Phase, will help prepare the team physically and mentally for the entire expedition. During this phase, the team will make arrangements for the remainder of expedition, embark on an overnight trek to prepare for the main trek later in the expedition, and begin to develop camaraderie as a team. In Bolivia, there are several short treks near La Paz and around Lake Titicaca, which enable the team to acclimatize before commencing the main trek.

Project Phase: The aim of the Project Phase is to do practical work that is of benefit to the host country. At the same time, the team will have opportunities during this phase to engage and explore a culture different from their own, as a local community plays host to the team for the duration of this phase. Projects in Bolivia may include working in rural schools in Samaipata near Santa Cruz, or undertaking basic construction work in orphanages and street children centers in and around the capital La Paz.

Challenge Phase: During this phase, the physical and mental capacity of the team will be challenged as the team completes a self-supported, multi-day trek. The trekking possibilities in Bolivia are unrivalled in South America. Teams may choose to complete a high altitude trek traversing great ranges or to walk along one of the old Inca Trails. Teams may choose to trek in the relatively untouched Central Highlands of Bolivia, which boasts unexplored caves, where dinosaur footprints and fossils are still visible. Teams can alternatively head to Rurrenabaque and Villa Tunari, both serve as a staging post for jungle trekking and a unique opportunity to hike amidst Amazonian wildlife.

Rest and Relaxation Phase: The final phase of the expedition is the Rest and Relaxation Phase. The aim of this phase is for the team to wind down and have some time to reflect at the end of the expedition. This phase may include cultural exploration in addition to relaxation. There are a number of options for a period of rest and a chance to see some of Bolivia's more unusual sights. For example, from Lake Titicaca, which is the highest navigable lake in the world, the team can explore the Island of the Sun, which is where the Incas believe their empire originated.

**Concord-Carlisle School District
Adult & Community Education
October 1, 2012 Director's Report**

Distribution: Advisory Committee, School Committee Liaison, Superintendent, Director of Teaching & Learning, CCHS Principal, Office Staff.

Courses and Enrollment activity

FALL 2012

Community Education	534
Instrumental Music	274
Driver Education (training in progress)	200+

The 2012-2013 fiscal year revenue/expense year-to-date for the period July 1, 2012-August 31, 2012:

Revenue	\$194,076
Expense	112,702
Encumbered	\$100,000
YTD Balance	(18,625)
Fiscal Year Starting Balance (unofficial)	85,585
Current Revolving fund balance	\$66,960

Activity of Note

The month of September was focused on semester start-up – arranging for course locations, course promotion, communicating with teachers, enrolling students, and other management tasks.

Fall enrollment is lower than hoped for, as the trend toward lower enrollments continues. A number of factors are involved, including space constraints, new clerical requirements, competition by other public sector groups, and online learning.

Our beloved Driver Ed teacher Gary Garafola was killed in a tragic accident at the end of the month. After a day of teaching safe driving to his students at CCHS he was hit by a car; the driver had fallen asleep at the wheel. Gary was with us from the inception of the program, and was one of 4 people who volunteered to obtain his RMV teaching certificate and establish the program at the high school. We will not be able to replace a Gary; few teachers are as genuine and caring as he was.

We are working on FY 12 financial records, and hope to have the final numbers reconciled with those of the Accounting office this week.

The cloud-hosted website is functional but some functions are too slow to be practical or effective. I am working on it now, and getting some IT help from the vendor.

We continue to have issues turning on desktop computers, as they are too old for recent network security installed on the school's new computers.

I will continue to encourage David Brashears and GlacierWorks to offer a winter event, and we may want to consider other possibilities.

We will conclude our long-running Computer Club for senior citizens on Thursday afternoon, as the Council on Aging offers one and is much better resourced.

We have added a new course this fall, Babysitting, for students in the Concord Middle School.

We finished training 2 new Driver Education teachers, Peter Mathiasen and Garrett Klatt.

Winter semester planning is now underway. Computing, Mandarin, and courses and teachers in the humanities are needed, as are volunteers for the Village University.

Michael Henchman plans to attend the Committee's October meeting, and has volunteered to serve upon your recommendation and School Committee appointment.

Respectfully submitted,

Court Booth

Report of the Citizens Transportation Committee of the Town of Concord

October 2012

Lisa Bergen (Chair)
Ray Bruttomesso
Rick Anderson
Kate Damon
Abe Fisher
Louise Haldeman
Mark Hanson

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Executive Summary

The Citizens Transportation Committee (CTC) was created by Article 4 of the April 24, 2012 Special Town Meeting. It was charged to “search diligently” for ways to keep the school transportation department in-house. Seven Concord citizens were appointed--4 by the Town Moderator, 3 by the School Committee The Committee has met approximately bi-weekly from May into October.

The Committee identified five major sub-topics: **Safety, Social Factors, Emergency Preparedness, Cost Analysis, and Site Selection.** Members of the Committee researched each of these areas and shared their findings with the Committee as a whole. This helped inform all members’ research, as the topics intersect at times. The concept of “Level of Service” crossed multiple topic boundaries. This refers to the expectations the community has of the transportation department, including driver road courtesy, the distance a student must walk to get to their bus stop, and the responsiveness of the staff to student needs and issues.

Findings:

- Safety

Research into bus safety found that Concord/Concord-Carlisle’s accident statistics are similar to neighboring towns. Also, state inspection records show that Concord/Concord-Carlisle’s maintenance quality exceeds that of the contract bus service used in Sudbury and Fitchburg. Statistics on bus routes show that Concord/Concord-Carlisle’s level of service exceeds that of Lincoln and Sudbury.

- Social Factors

With regard to social factors, CTC found that transportation department staff are considered part of the broader community. Concordians place a high value on loyalty and fairness to school employees. The committee also learned that the bus drivers act as an informal “neighborhood watch.”

- Emergency Preparedness

With regard to emergency preparedness, CTC found that the transportation department is a part of the Town’s Emergency Management plan and that Emergency use of Transportation assets is irregular and unpredictable.

- Site Selection

CTC found that the transportation infrastructure--building(s), fueling station, bus parking, etc., could be replicated (excluding land cost) for between \$650,000 and \$850,000. We also found that transportation departments work best when all the pieces of the infrastructure (bus parking, maintenance, fueling, etc) are in a single central location.

- Cost Analysis

CTC found that in-house operation of the school buses is less costly than outsourcing and that nationally, school systems that have outsourced transportation have seen a significant cost increase after the initial contract ends.

Recommendations:

The Committee makes the following recommendations:

1. The School Committees commit to keeping School Transportation in-house for a minimum of five years.
2. The best location for the School Transportation Department is its current location.
3. Maintain the current level of service.
4. Encourage bus ridership.

Respectfully Submitted:

Lisa Bergen (Chair)
Ray Brutomesso
Abe Fisher
Mark Hanson

Rick Anderson
Kate Damon
Louise Haldeman

Acknowledgements

The Committee is grateful to a large number of people, both within the Town and across the Commonwealth, for their input, advice, and data. Many people have helped and contributed to this process. In particular we would like to acknowledge the contributions of Wayne Busa, John Arena, the entire staff of bus drivers and mechanics, Town Manager Chris Whelan, Town Treasurer Tony Logalbo, Town Clerk Anita Tekle, Ruth Lauer, Bill Plummer and all the citizens who attended Committee meetings and hearings to provide feedback and input.

The Committee also acknowledges the untimely death of bus driver Gary Garafola. The response to Mr. Garafola's passing illustrates the inclusion of the bus drivers in the broader community far better than any report could.

Finally, the Committee wishes to acknowledge the contributions of Committee member Ray Bruttomesso. Ray was called to active duty as a military supply officer to be stationed in Kabul, Afghanistan, for the next 9 months. Although he was unable to complete his time with the Committee, his knowledge, interest in the subject, and basic humanity were of great value during this process.

Introduction

The Citizens Transportation Committee (CTC) was formed by vote of the Concord Special Town Meeting of April 24, 2012. It was charged to “search diligently for ways to maintain the existing school transportation department.”¹ Although originally intended to have membership from both Concord and Carlisle, no Carlisle residents expressed interest in serving and thus all seven members of the committee came from Concord--four appointed by the Moderator and three by the School Committee.

The Committee met approximately biweekly from May to October and held two public hearings to receive input from the public at large. It invested, by a conservative estimate, more than 1200 person-hours of time on research into five broad areas: Safety, Social Factors, Emergency Preparedness, Cost Analysis, and Potential Sites. In researching and deliberating these areas, the committee identified a sixth area of interest that crosses many of the boundaries between the original five. That area is what we have called “level of service.”

Level of service refers to a wide variety of factors that reflect how (and how well) the transportation department meets the needs of the community. It ranges from the distance a student has to walk to reach their bus stop, to the response the community expects when contacting the department, to the level of driver courtesy to other drivers. It is distinctly not measurable in total, but in many ways it is the thing that best describes the community’s understanding and connection with the transportation department.

Consideration of how to keep school transportation in-house requires acknowledging certain fundamental truths. Regardless of who operates them, there will have to be school buses, and the buses will need to be bought. Those buses will need drivers, maintenance, and fueling, as well as a place to park. Drivers and mechanics will have to be paid, fuel will have to be purchased, and a parking lot will use space that some might wish to use in another way. Whether the schools operate the system or contracts it out to a private provider, these expenses will not go away, nor will they be smaller for a private contractor. The managers of a private contractor will have a responsibility to the owners or stockholders of the company to turn a profit.

This report has been written with certain assumptions in mind. Consonant with the Committee’s charge, transportation will remain in-house. Proper evaluation of the choice between in-house and outsourced transportation requires explicit consideration of the intangible values of the community, rather than a focus solely on the budget.

Keeping school transportation in-house also requires thinking about a number of different questions. If the department remains in-house but cannot stay in its current location at the high school, where should it go? What will it cost to create a new departmental infrastructure? The further the buses are from where they are needed, the more expensive they will be to operate and the greater the chances for delays. Separating bus parking from maintenance would make routine maintenance more difficult to manage, creating an opportunity for mechanical issues to crop up and not immediately be addressed.

¹ See Appendix L for the full charge

Concord/Concord-Carlisle offer a higher level of service than is required by the Commonwealth. CTC's research shows that school systems which use a private bus company do not offer the same level of service as is offered in Concord/Concord-Carlisle.

Outsourcing may provide savings in some areas. For example, if the transportation service is switched to a private contractor, the Town would have no future post-employment obligations beyond those for persons who are already vested.² However, the actual cost avoidance would be small.

If the transportation staff are no longer employees of the town and regional school district, how will this affect the relationship of the transportation staff/drivers to the schools as a whole? The bus driver is usually the first and often the last contact a student has in the school day. Many students say that they have had the same bus driver throughout most of their schooling. How important is it that bus drivers consider themselves an integral part of the school system?

Many towns have outsourced transportation. In cases where towns have long standing relationships with a particular company, there can be a reasonable level of trust between the community and the drivers. This is dependent on a well-constructed bid between the provider and the town in which the services requested are clearly specified and enumerated.

Although we will need to put up with less than optimum conditions while construction of the high school is going on, the buses must continue to roll. Cooperation of the transportation staff during this difficult period will be very important.

The School Committees must give much more thought to these questions. No matter what course of action is ultimately taken, the public expects and deserves a full and open accounting of the choices being made, including consideration of non-financial factors.

² See "Personnel Benefits" in the cost analysis section for details about post-employment costs for current and past employees

History of School Transportation & How Our System Works

The history of Public education in Massachusetts started in 1647, when by act of the Bay Colony all settlements with fifty or more families were required to appoint a school master to teach reading and writing “to all children as shall resort to him”. In the three and half centuries since, the curriculum as well as the structure of schools have undergone many changes. Communities have become larger, schools have become more consolidated. Families began to live further from the schools, and in 1869 Massachusetts enacted legislation allowing public funds to be used for transporting students to and from school. The first “school buses” were horse or ox drawn carts. Schools and school buses have both continued to evolve, but the need for students to get to school each day remains.

Concord has a three tier system with 3 elementary schools serving K-5; one middle school with two buildings serving grades 6-8; and one high school, grades 9- 12, which is regionalized with the town of Carlisle. There is also a fourth building, formerly an elementary school, which houses the administration and some early childhood classes. The two middle school buildings are approximately one mile apart on the same street, but all the other school buildings are widely separated from each other.

Two of the elementary schools are located near the centers of Concord and West Concord and thus a number of students live close enough to be able to walk to school. Concord-Carlisle High School is also close enough to more densely populated areas for a number of Concord students to walk, but Carlisle students obviously are too far to walk to school in Concord. Most students in both the Concord Public Schools and the Regional High School use, or are eligible to use, a bus to get to and from school, and to serve these students a large number of buses are required.

Prospective drivers are interviewed by the transportation department manager and given a road test. If they pass the road test, they interview with the Deputy Superintendent. Their driving record is checked, a CORI check is performed, and they must pass a physical exam. New drivers are given a six month trial period during which the transportation manager monitors their performance. If a driver ever fails to meet safety standards, they can be discharged. All drivers must pass an annual physical exam and are subject to random drug testing by law.³

Bus routes are first developed by a software package and then adjusted by hand to reflect specific local needs. These include changing or adding stops on a road that is too dangerous for students to walk along as well as modifying routes to account for known traffic issues. In making these changes, safety is the top priority. Because the transportation department makes safety its top priority, the radius within which students must walk to school is smaller in Concord than is mandated by the state.

Drivers are paid based on a contract that establishes steps ranging from \$18.34 to \$22.38 per hour. Regular drivers are guaranteed at least 25 paid hours weekly, which makes them eligible

³ This paragraph, as well as the subsequent paragraphs on how the transportation department operates, are drawn primarily from Appendix G

for benefits. Full staffing includes 29 regular drivers and 4 “spare” drivers, who provide coverage for absent drivers. This limits unpredictable expenses and helps assure level of service. A regular driver is “on the clock” from 6:15-9:15 AM and then from 1:45-4:15 PM, which works out to 5.5 hours/day or 27.5 hours/week. On any given day, a driver might also drive a field trip, increasing their hours for that day. The first 8 hours are paid at the hourly rate, while the excess above 8 hours is paid the overtime rate. If a driver will be driving after regular school hours (as with an “away” sports event), a spare driver might take over the route for the afternoon. This creates no additional cost, as the spare driver is already being paid. The regular driver will be paid their regular hourly rate until 4:15, but any time after 4:15 is paid at the overtime rate.

Occasionally there will be so many buses needed for after school trips that the department will have to hire a private contractor (usually Dee). If this occurs, the private contractor will take the traveling students (normally an athletic team) to their destination, but a Concord/Concord-Carlisle bus will pick them up at the end. Dee charges a flat fee of \$195.00 for this type of one-way “drop-off” service.

During the summer, the Recreation Department hires the transportation department to bring students to the Recreation Department camp. This has typically been charged at a rate between \$40 and \$42/hour. The Recreation Department investigated using a private contractor recently and found that it would likely cost at least 50% more.

At one point Concord used a private contractor to provide busing, but after a careful review of costs, Concord invested in its own bus system. This has proved to be a very satisfactory solution and periodic reviews by former school committees have indicated that although quality bus service is never cheap, it is more cost effective to be doing it ourselves rather than paying a service that would need to make a profit over and above the costs. Concord has been running its own buses for 58 years, possibly making it the oldest in-house system in the state.

Safety

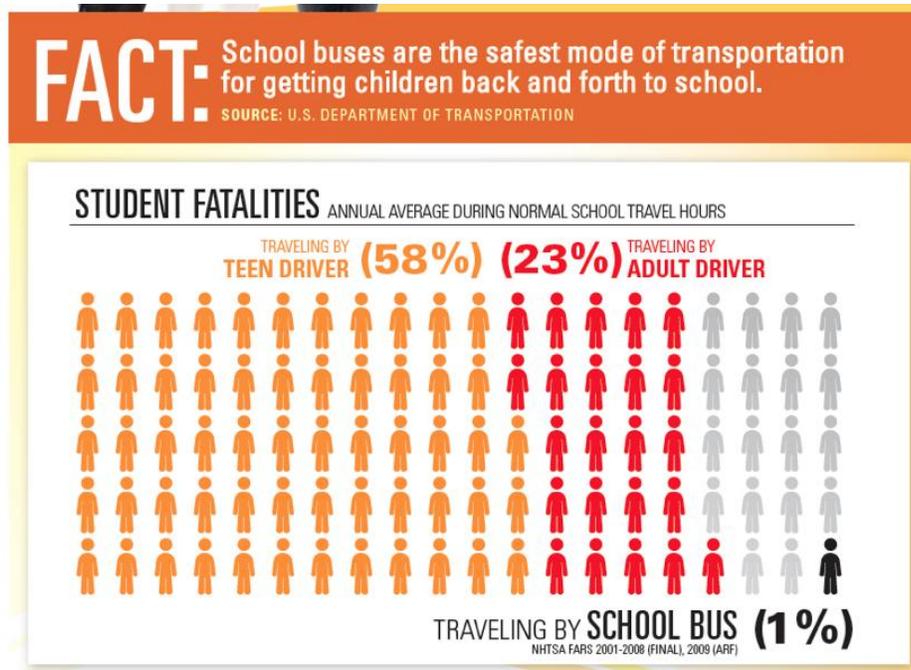
Summary of findings

The CTC charge required the committee to investigate the safety of the school transportation department as compared to private bus companies. Ultimately this developed into a consideration of a number of different facets of bus safety. These included the basic level of safety of school buses in general; the accident rates of our drivers and the drivers employed by private companies; the quality of maintenance, as reflected by state inspection reports; and the level of service provided by the transportation providers of different towns.

In summary, to and from school, a bus is safer than walking, biking or riding in a car. Massachusetts Registry of Motor Vehicle accident data from 2002-2010 shows that Concord/Concord-Carlisle bus drivers are as safe as those in neighboring towns. Mass DOT inspection reports show that our buses have only 20% the defect rate compared to the buses operated by First Student. Finally, Concord/Concord-Carlisle provides a higher level of service (more bus stops and routes) than Lincoln or Sudbury and without charging fees. Estimates are that about 70% of students ride our buses to school vs. 60% for Sudbury. This difference increases student safety while it reduces traffic congestion at the schools.

Background: The greatest fatality risk is riding to school in a car

The figure below, from a National Highway Traffic Safety Administration (NHTSA) shows school buses are the safest way to transport children to school. Not only is busing safer than riding in a car, it's safer than walking or riding a bicycle (the fatalities indicated in the gray area).



Teenage drivers are the least safe way to get to school.

School buses are safer than other modes because:

- A school bus is a large vehicle designed to keep children safe.
- School bus drivers are comprehensively trained and carefully licensed.
- Three times a year state inspectors go over the bus interior, exterior, chassis, and engine compartment. Failed items must be repaired.
- Before and after each trip the school bus driver safety-checks their bus⁴.

Bus safety, in the broadest sense of the word, is continually improving. For example, the NHTSA and US Department of Transportation conduct bus crash tests as one aspect of their work to improve child safety. Drivers attend training on aspects of child behavior, defensive driving, and new vehicle capabilities to maintain their licenses. The Massachusetts Registry of Motor Vehicles updates its safety checklists for state bus inspectors and for bus drivers as needed to improve safety and respond to improved vehicle designs. These are just a few examples.

Introduction

The section measures the performance of Concord/Concord-Carlisle's in-house transportation department at providing safe busing, both in absolute terms and in comparison to departments in other towns using outside sources of data collected in an unbiased manner. This report therefore examines the following:

- Driver qualification, training, and preparation: These have an impact on a driver's ability to avoid accidents, work effectively with students, and improve safety. Professional drivers, properly trained and supported are the key to safe operations.
- Bus maintenance and specification: These reflect the physical condition and safety of buses.
- Accident statistics: These measure driver how well drivers have avoided collisions.
- Annual driver turnover: This addresses our ability to find and retain good drivers.
- Level of service: This encourages more students to take the bus and minimizes on-street walking to bus stops, both of which directly affect the safety of students off the bus.

A discussion of safety is incomplete unless it includes a child's experience riding the bus to and from school and a parent's confidence in their child's security while riding the bus. Safety is a broad topic.

Driver Qualification, Training, and Preparation

Qualification: Before a driver is hired, the transportation department reviews their experience and background, including a CORI check. All drivers in the department must pass annual CORI checks and random drug tests.

⁴ For videos on how a driver checks a bus see:
<http://www.youtube.com/watch?v=xmpR6kc4xQ0&feature=related>
and
<http://www.youtube.com/watch?v=63GmHRCFYoY&feature=fvrel>

Training: To retain their Massachusetts licenses, school bus drivers must attend at least eight hours of driver training annually. Concord/Concord-Carlisle provides more than the minimum training. Specialists in various topic areas conduct training sessions. For example, a safety specialist from the Federal Railway Administration conducts railroad safety training. School counselors provide training on bullying. Drivers are qualified in first aid and CPR.

Preparation: For each route, the department provides the drivers information about special needs of students on their routes, so the drivers are prepared to respond appropriately. Before the start of each school year, drivers review their routes and test-drive them to validate the schedules. These preparatory efforts reduce driver stress and improve safety.

The transportation department instructs children on safe bus behavior. Annually, drivers drill their riders on safe bus evacuations. Each fall Concord provides school bus orientation for Kindergarten students before school starts, so new school children can be familiar with a bus and know how to behave safely when riding.

The Concord/Concord-Carlisle drivers are assigned a specific bus. They keep that bus throughout the year. It becomes essentially ‘their bus’. This policy encourages the driver to keep the bus spotless. Drivers wash and clean their buses inside and out. These factors help keep the buses clean and in good working order. Drivers work closely with maintenance people as needed to fix mechanical problems. Finally, before and after each trip drivers inspect their bus inside and out using a detailed checklist (a copy is provided in Appendix B). Drivers fill out this checklist for each trip. A driver can lose their license for driving a bus that fails the pre-trip inspection checklist.

Bus Maintenance⁵

Well-maintained buses provide safer and cleaner transportation for students. State inspectors check the physical condition of buses three times each school year, using a checklist covering 48 categories of items on the interior, exterior, chassis, brakes, and engine compartment⁶. We tallied copies of 1534 inspection records covering December 2008 to January 2012 to measure the physical condition of Concord/Concord-Carlisle’s buses and First Student’s buses in Sudbury and Fitchburg (procedure outlined in Appendix I). The results show problems with First Student’s maintenance.

Most defects an inspector finds are fixed the same day, such as replacing a missing decal or freeing a sticking emergency door. An inspector will remove the bus’s inspection sticker and apply an “Out-of-Service” (OOS) sticker for a more serious defect that makes the bus unfit for transporting students. Examples might be problems with the brakes or exhaust system. An OOS bus must be repaired and reinspected before it can again transport students.

Defects typically have been a problem on the bus for some time before the inspection. Proactive maintenance provided by conscientious drivers and mechanics keeps buses safer and cleaner by eliminating problems as they occur and not waiting for inspectors to point them out.

⁵ This analysis extends an earlier analysis by Susan Kalled presented at the special town meeting in April 2012.

⁶ See Appendix C for a copy of the checklist.

The results show Concord/Concord-Carlisle’s drivers and mechanics are more proactive about bus maintenance than First Student’s drivers and mechanics.

The condition of a bus affects the ability of the driver to operate it safely as well as the frame of mind of the students and student behavior while on board. A well maintained bus is more likely to have well-behaved riders and a driver who is in control.

The table below tallies: 1) the number of inspection sheets examined, 2) the number of buses inspectors took out of service (OOS), 3) the number of buses inspectors failed with one or more defects, 4) the total number of defects inspectors found, and 5) the most defects found on a bus. The final three columns show percentages versus the number of inspections.⁷

School Bus Inspection Results

Type C and D bus inspection	Inspections	Out of Service	Failed	Defects	Most Defects per bus	Out of Service%	Failed %	Defects %
Concord	361	4	47	81	4	1%	13%	22%
First Student Fitchburg	816	65	416	903	11	8%	51%	111%
First Student Sudbury	357	18	216	360	6	5%	61%	101%

State inspection records reveal Concord/Concord-Carlisle buses are in better shape than First Student’s.

⁷ Note that the Defects % column includes values greater than 100% because a single bus may have more than one defect.

Bus defects tend to rise with mileage and time, particularly if the bus is not well maintained. In tallying the above data we also recorded each bus's odometer reading when inspected. Here's the average for all inspections by town:

School Bus Ages

Town	Avg. odometer miles	Estimated age (years)*
Concord/Concord-Carlisle	58,849	7.06
Fitchburg	47,952	4.00
Sudbury	68,654	5.72

*This age is estimated from the odometer reading using the school administration's reported average miles/year for buses: about 12,000 for First Student and 8,333 for Concord/Concord-Carlisle. (Concord/Concord-Carlisle's bus depot is centrally located and the transportation department does not do extra charters.)

Concord/Concord-Carlisle's buses are in better shape because the transportation department is focused on providing safe, clean transport for school children, and the transportation staff works as a team to accomplish that goal.

Why do First Student's buses have so many more defects?

The Concord/Concord-Carlisle Transportation Director assigns each bus driver to a particular bus. It is their bus. The driver is invested in the condition of the bus. They are responsible for keeping it clean inside and out. Concord/Concord-Carlisle's drivers are familiar with their bus and since most of the time no one else drives it, they can give mechanics more accurate information on problems. Working together they find and fix defects as they occur. The mechanics in Concord/Concord-Carlisle are skilled and adequately staffed. They maintain 36 buses and roughly as many other school department vehicles. They are able to keep up with the work. Outsourcing companies actively solicit non-school charters. The following text was taken from company websites;

"All of our buses ... are great for schools, churches and temples, company outings, birthday parties, Bar and Bat Mitzvahs, bachelor and bachelorette parties, weddings, and other activities."⁸

"..shuttling your wedding guests doesn't need to cost a fortune. Leave the transportation to our professionally trained drivers and put the savings toward the honeymoon you've always dreamed of"⁹.

State inspectors will fail a bus for lack of cleanliness. For example, one inspector wrote the following comment as part of an inspection of a First Student bus assigned to Sudbury [capitals

⁸ "Doherty's Garage." *Doherty's Garage*, accessed October 2, 2012, <http://www.dohertysgarage.com/buses.htm>

⁹ "First Student Charter Bus Rental ! Online Quotes From \$1.50 Per Person," *First Student*, accessed October 2, 2012, <http://www.firstcharterbus.com/>

in original]: “ALL HOLIDAY DECORATIONS MUST BE REMOVED FROM INSIDE OF BUS FOR THIS BUS TO PASS INSPECTION. ALL WINDOW DECORATIONS MUST ALSO BE REMOVED.”
 Concord/Concord-Carlisle does not rent out school buses to transport parties¹⁰.

Optional Equipment that Improves Safety

Concord/Concord-Carlisle chooses equipment to improve bus safety. For example, Concord/Concord-Carlisle buses use ‘thermo-pane’ glass for the windshield, door, and selected windows. This allows the driver to see in wet conditions when single pane glass would fog up. The double layer glass is much easier to defrost. Better visibility in stormy weather increases driver situational awareness, which enhances safety.

Accidents

Most school bus accidents involve other vehicles hitting a bus. School bus drivers are among the most highly trained and safe motor vehicle operators on the road.

This analysis of Concord/Concord-Carlisle’s school bus accident statistics uses a selection of all accidents involving a school bus in the Massachusetts Registry of Motor Vehicles (RMV) accident database covering 2002-2010 (as much school bus accident data as they have).

The table below shows the results of our analysis. The percentage of accidents in Concord/Concord-Carlisle possibly caused by a school bus driver is not significantly different from the percentage found both in neighboring towns and in the rest of the state as a whole. Acton has an in-house system. Sudbury contracts with First Student, Lexington with C&W, Lincoln with Doherty and First Student, and Bedford and Carlisle with Bedford Charter.

Massachusetts Registry of Motor Vehicles records of school bus accidents 2002-2010			
Towns	Percentage possibly contributed to by school bus driver	All accidents	Bus driver contributed
Concord	31%	39	12
Acton	25%	8	2
Carlisle	50%	4	2
Sudbury	21%	19	4
Bedford	56%	16	9
Lincoln	43%	7	3
Lexington	47%	15	7
State Total	21%	4519	943

¹⁰ This raises an interesting question: Do school buses transporting parties dilute the safety provided by the special colors and “school bus” labeling?

Why do the percentages vary so much town-to-town?

School bus accidents are infrequent and random. Accident statistics for individual towns vary widely from year to year. The percentages vary because of the relatively small number of accidents in each town, even over the nine year period covering 2002 -2010. While the percentage variation is large, it does not conclusively reflect an actual difference in driver performance. Concord/Concord-Carlisle’s drivers have an accident record that is about the same as drivers in neighboring towns, given the limited sample.

The following table shows school bus accidents by town by year. School bus accidents are random events. Yet if the sample area is large enough, as is the case with the State Total, the variability is less as a proportion of the total count. Concord varies from 1 to 11, while the state varies from 471 to 569. Smaller samples produce greater variance.

School Bus Accidents by Town by Year

Towns	2002	2003	2004	2005	2006	2007	2008	2009	2010	total
Concord	8	11	2	1	3	5	4	2	3	39
Acton	1	2	0	1	0	1	1	3	0	9
Carlisle	0	0	1	0	0	1	0	2	0	4
Sudbury	2	2	3	1	5	0	1	2	3	19
Bedford	2	4	1	1	0	1	2	5	2	18
Lincoln	2	1	0	3	0	0	1	0	0	7
Lexington	5	2	3	0	0	1	2	0	2	15
State Total	491	555	480	510	471	460	501	569	482	4519

More discussion of school bus accident statistics, including other ways to visualize the data, can be found in Appendices D, E, F and H. These appendices discuss how CTC processed RMV data to derive these results as well as how one can better interpret the statistics. They also provide a snapshot of the administration's findings and why these results differ.

In May, the school administration presented safety statistics to the School Committee (see Appendix D for the statistics and for a brief description of the history of the presentation).The presented result (displayed in the second table in Appendix D) appeared to show that Concord/Concord-Carlisle had 13-times more accidents per mile than First Student and 2-times more accidents than C&W

The proportion of accidents caused by the bus drivers in Concord, Lincoln (First Student & Doherty), Sudbury (First Student), and Lexington (C&W) are too similar to support the school administration’s conclusion. Most school bus accidents are not caused by the school bus driver. For Concord/Concord-Carlisle to have 13 times as many accidents per mile as First Student operating in Sudbury, somehow all drivers in Concord/Concord-Carlisle would have to be crashing into school buses 13 times more often per mile than they do in Sudbury. Traffic conditions vary town to town, but not that much. Clearly, the school administration’s statistics do not reflect the same data as the statistics presented here.

Driver Turnover

Low turnover increases safety because drivers are more familiar with the town, students, their families, and the local transportation system. Low turnover is an indication that the town is providing drivers with a reasonable working environment where they can get work satisfaction.

Concord/Concord-Carlisle's current turnover rate is lower than outsourcing companies despite the recent turmoil surrounding and within the department. Before 2010 the rate was about 4%. The rate may be higher currently because of driver uncertainty about the future of working in Concord/Concord-Carlisle. Even with the uncertainty, our turnover rate is lower than First Student's. A brief investigation into other towns showed that Concord/Concord-Carlisle's turnover rate is comparable to those towns.

Annual Turnover Rate

Provider	Annual Turnover
Concord	8%
Foxboro	4%
Cohasset	2%
First Student	10%

Paid Sick Days

Concord/Concord-Carlisle drivers may take one paid sick day per month. First Student allows up to four unpaid sick/personal days per year. If a First Student driver takes 5 or more (unpaid) sick days in a year they sacrifice their annual bonus.

Concord/Concord-Carlisle's policy on sick days results in drivers who are less likely to show up for work with an illness. This increases the safety of our system:

- Healthy drivers drive more safely and are more effective at dealing with children.
- Contagious drivers might also infect students, potentially spreading disease into the student population and beyond.

Paid sick days increase safety and general health during flu season.

Level of Service

The number of bus routes and stops affects safety. More bus stops relative to a given enrollment means bus stops can be closer to student's homes. Concord/Concord-Carlisle picks up students at their home in areas where it might be unsafe for students to walk, especially on dark winter mornings. More bus routes decreases the number of bus stops per route. Fewer bus stops per route means less travel time for the students, which increases safety and reduces the potential for delays.

Comparative Level of Service

Towns	Enrollment	Level-of-Service			Average stops per route
		Routes	Stops	Average students/stop	
CCHS	1209	43	600	2.02	13.95
Concord k-8	1991	95	1595	1.25	16.79
LSRHS	1601	34	563	2.84	16.56
Sudbury k-8	3102	59	1332	2.33	22.58
Lincoln k-8	505	14	266	1.90	19.00

The table above shows that Concord/Concord-Carlisle’s level of service is higher than surrounding towns. Buses pick up and drop off students closer to home and drive shorter routes. Possibly this higher level of service encourages more students to take the bus. Another reason may be that Concord/Concord-Carlisle does not charge a fee, whereas Sudbury charges a fee to families living within 2 miles of schools (\$350 per student per year with an annual \$650 cap per family). Though it is difficult to measure precisely, Concord/Concord-Carlisle buses typically transport about 70% of our students to and from school, whereas in Sudbury reportedly about 60% of students ride the bus. Increased ridership increases safety.

Why bus fees reduce safety

Fees reduce the number of students using the bus to get to school. Fees reduce safety because more students are walking, biking, or driving to get to school. Fees also create administrative costs. School systems that charge fees in Massachusetts hire extra help in the summer to register students for pick up, collect fees and issue bus passes. Late registrations (after the end of July) may require rerouting buses and altering bus schedules. One town surveyed offers a \$50 discount for payment before mid July. The transportation manager of that town indicated many families still sign up as late as October, complicating her bus routes and sometimes creating complete changes in routing. Having no fees eliminates the work of registering riders, collecting fees and rerouting buses to pickup and drop off those who register late. No fees encourages ridership, which increases safety for students and reduces traffic congestion at schools.

Most of the fee-charging towns surveyed¹¹ advised that if the town considers fees, it should also consider the reduced safety, increased congestion, and increased administrative costs associated with fees and reject the proposal.

Safety - Conclusion

To reiterate: School buses are the safest mode of travel for students to and from school. Statistically, Concord/Concord-Carlisle’s accident performance is not demonstrably different from that of its neighbors. However its maintenance record, personnel policies, and level of service are noticeably better than those of private contractors. CTC sees no reason to outsource, and many reasons to retain transportation in house, based on safety.

¹¹ (from the 5/8/2012 school committee meeting minutes -- emphasis added)

“Transportation Report and Survey Results. ... Ms. Rigby stated that 840 parents responded to the survey resulting in an overall participation rate of 27%. *Many comments were received and it was noted in the sentiments that we should not be charging bus fees and there was some support for bus fees but not expensive bus fees.* “

Social Factors

A number of intangible social factors play into the question of retaining the transportation department. The school bus driver is frequently the first and last contact a student has with the schools on any given day. The drivers do more than merely operate the buses. They receive Open Circle¹² training and are part of the educational team for any student on their route who has special needs. They also establish the tone on the bus, extending the anti-bullying norms of the schools to the buses. They are in every sense members of the broader community.

The drivers contribute to the community at large in significant ways. As with other communities nationally, they act as an informal neighborhood watch.¹³ As one driver said, “If you get a new car, we know it. If there’s a strange car in your driveway, we know that, too.” They also assist public safety, reporting downed trees and similar hazards. Many citizens commented, either privately or at the Committee’s hearings, on how the drivers connect to the school community beyond the basic requirements of their jobs. When a team has an away game, the driver(s) often will watch and cheer for them. Drivers will sometimes join in on field trips, as well. Perhaps the most powerful demonstration possible of this connection can be seen in the outpouring of grief and sympathy following the recent death of bus driver Gary Garafola. That he touched the lives of many students and their families profoundly seems beyond doubt.

It is important to appreciate all the different parts of the school system. Concord/Concord-Carlisle parents have overwhelmingly indicated the importance of the drivers to their child’s educational experience. One parent observed at a Committee hearing that to define transportation as somehow not central to the schools effectively declares that transportation employees are less important.

The local community also appears to place significant value on the quality of service provided by the transportation department. If there is a problem of some kind, whether it is a musical instrument left on the bus or a mix-up about stops, when parents call transportation, they are used to having the call answered by a local person who has some responsibility and who reports to another local person. Many parents have commented on their experiences in other towns where they called the local transportation department and could only speak to a busing company employee who was completely unhelpful. The contrast with Concord/Concord-Carlisle’s transportation department could not be more powerful.

Concord/Concord-Carlisle also places a high value on environmental awareness and on “buying locally.” Many private contractors are large national or international corporations, so that tax dollars spent with them are less likely to remain in the local area. Moving the bus depot away from a central location is also environmentally careless, since the additional fuel expenditure is certainly non-trivial.

¹² “Open Circle” is the portion of the curriculum devoted to social issues, such as anti-bullying

¹³ See, for example, <http://www.pbs.org/newshour/rundown/2012/09/williston-area-schools-suffer-bus-driver-shortage-on-first-day-of-class.html>

Most of these issues have more to do with personal philosophy than they do with the dollar cost of transportation. Yet it is clear that these issues speak to the community. It would therefore be both irresponsible and non-responsive to the taxpayers to make a decision about outsourcing that did not explicitly address these issues.

Emergency Preparedness

The transportation department does more than bus students at the beginning of school and at the end of the school day. The buses are used for additional functions related to the school such as the late bus, transportation to sporting events and other extra-curricular activities such as the prom. The buses are also used during the day for field trips.

Non-school related activities such as Concord Recreation Programs also make use of the buses. These additional functions are all planned and scheduled in advance.

The transportation department also has an important function, which is planned but not scheduled. Concord's emergency preparedness plans rely on the transportation department for certain functions.

CTC looked at the town's emergency preparedness plans to gain an understanding of how the transportation department and the school buses are integrated into the plan. CTC also examined other towns to gain an understanding of how they address emergency preparedness and if and how they integrate school buses.

Concord

The town of Concord has Emergency Preparedness plans overseen by the Chief of the Fire Department and the Local Emergency Planning Committee. The town has a manual consisting of a large three ring binder¹⁴ which includes procedures on what to do in case of specific types of incidents such as fires, chemical spills, or floods. The procedures include details that are both location and incident specific. Locations include both public and private facilities (e.g., Alcott School, a nursing home, and MCI - Concord). The plan recognizes that responses will be different based on both the type of incident and location.

One of the concerns when an incident occurs at a location that has a large population is what to do with that population. The Emergency Preparedness plan includes scenarios which contemplate the use of various vehicles to either transport persons from the facility or to temporarily hold the persons; this second method is referred to as shelter in place.

One of the options described by the Emergency Preparedness plan is the use of the school buses owned and operated by the Concord Public School and the Concord Carlisle Regional School District. The transportation department plays a part in the execution of this plan. The Emergency Preparedness plan in the past included Dee Bus services, a private service, as some of their buses were stored in Concord.

¹⁴ As this binder does not exist in electronic form, we did not obtain a copy.

Fire Department

The fire department is primarily responsible for handling the incident. As part of evaluating the situation, whether fire or other situations, the fire department determines if there is a need to either transport people or shelter them at the scene. If the department determines that school buses are needed to either transport or shelter personnel in place, the department contacts the school transportation department to send the required number of buses to the incident location.

School buses are not the only method used for transporting. Depending on the situation, the desired vehicle could be an ambulance or van.

School Transportation Department

Once it has been determined that a school bus is needed or likely to be needed to either transport or shelter in place, the fire department makes contact with the School Transportation department. The fire department has a series of phone numbers including work and cell phone numbers to contact personnel in the Transportation department. The transportation department likewise has a list of persons to contact to drive the buses.

In order to get the bus to the location, the bus, the keys, and a driver are required to be at the same location. Currently the buses and the keys for the buses are both located at Concord Carlisle Regional High School property when not being used. The location of a driver is dependent on the when the event occurs.

A driver must have a commercial license, including an 'S' designation for students, for the size vehicle being driven. Within the transportation department, not only the drivers but other personnel including the transportation manager, the transportation coordinator, and a mechanic meet this requirement.

Several of the members of the fire department also have commercial licenses (but without the S designation). While it has not been required, one of these members of the fire department could move the bus from the storage location to the incident location/site for sheltering of persons.

Use of the System

The use of the Emergency Preparedness system has fortunately been limited. The use of school buses in conjunction with incidents associated with the Emergency Preparedness plan has been even more limited. The record of events does not provide an easy method to determine when a school bus has been used. It is necessary to examine each record to determine if a school bus was used. While there are anecdotal recollections that school buses were used for one event or another, there are no easily accessible records that clearly record such use.

One example of a school bus being used was in the early 2000s when a chemical spill occurred at Alcott school. As a safety precaution, the students were transported to the high school.

In addition, as this report was being written, an incident occurred on September 18, 2012 at Walden Nursing Home on Main Street. Two school buses were called to be used for sheltering in place.

In both these episodes the event occurred during the school day and the transportation department had personnel in their facility. In the first situation, the persons being transported were students and the responsibility of the Concord Public Schools. In the more recent event, the persons who were sheltered in place were the responsibility of a private entity. The issue of whether and who reimburses the school district regarding costs incurred has not been addressed as of this writing.

Emergency Preparedness plan – Comparisons to other towns

With respect to emergency preparedness, the committee contacted other towns to determine how communities, including both those that have in-house transportation departments and those that contract for transportation approach emergency preparedness. The committee's inquiries focused on whether the local school bus system is used for transportation or sheltering in place during an emergency and if so, how. The contacted towns illustrate a variety of methods of approaching emergency preparedness. As actual emergencies of this sort are a rare occurrence, the person to whom we spoke, could only comment regarding the planning portion.

Carlisle

The town of Carlisle consists almost exclusively of single family residences and thus has no need to transport or shelter in place large groups of people. Carlisle does not have a plan that incorporates the use of school buses or describes other methods to transport large groups of people.

The area of emergency preparedness is another example of how the town of Concord and the town of Carlisle approach transportation issues differently.

Acton

The town of Acton uses an in-house bus system. Their system of busing and emergency preparedness is similar to the Concord system.

Bedford

The town of Bedford, like Carlisle, uses Bedford Charter for transportation of students. In contrast to Carlisle, Bedford has an emergency preparedness plan that incorporates the use of Bedford Charter resources. The plan uses a similar method to Concord where the buses can be used either for transportation or sheltering in place during an emergency. In case of emergency, the Bedford school transportation department contacts Bedford Charter Bus to provide the service. As in Concord, the town should be able to get school buses twenty-four hours a day seven days a week.

Sudbury

The town of Sudbury contracts out for transportation of students. First Student, the service used by Sudbury, is an integral part of the emergency preparedness plan. Although contracted, the emergency preparedness system is similar to Concord.

The buses are stored in Sudbury. The transportation person, who is a First Student employee, is part of the emergency preparedness plan. The transportation person is part of the phone chain to deliver the school buses to an incident location.

As indicated in other portions of the report, Sudbury's approach to busing is drastically different than Concord. The town does not bus as large a percentage of students as does Concord. Sudbury does not have as many reserve buses as Concord.

Lexington

The town of Lexington also contracts out student transportation. Administrators from the school transportation department indicated that the bus contract does not extend to emergency preparedness functions. The emergency preparedness department could not be reached.

Framingham

The town of Framingham has recently transitioned from an in-house school bus system to a contracted system. Durham Transportation Service transports their students. Framingham has not had a situation since their transition from in-house busing to contract busing where buses were needed for a local emergency. The personnel in Framingham are confident that the system will work. An important factor in the success of the plan and execution is the relationships between the parties.

Other towns

Other towns have systems where school buses are part of the emergency preparedness plan. However their plans differ from Concord's in that the plan only uses school buses for public facilities. The emergency preparedness plan expects private facilities including nursing homes to arrange transportation in their own emergency preparedness plan.

In addition to school buses, other towns incorporate other vehicles such recreational department or Council on Aging vehicles. One town incorporates State Department of Corrections Vehicles into their plan.

Conclusion – Use of school buses in emergency preparedness plan

The way a town uses or does not use school buses in their emergency preparedness plan is not tied to whether the school district uses in-house bus transportation or contracts the busing services.

Fortunately most towns have not had an emergency in which they had to implement their plan in which they use their school bus. Representations that the plan will work regardless of whether it is a school day or 2 AM on a holiday weekend need to recognize that actual use of the plan may identify flaws.

Regardless of whether the school district determine to use in house or contracted busing, the town of Concord needs to ensure that the emergency preparedness plan reflects the current arrangements; as indicated above the town modified the plan after Dee buses were moved out of town. The town may determine that the scope of the emergency preparedness plan needs to expand or contract. Responsibility for the emergency preparedness plan for the town of Concord is not the responsibility of the Concord Public School or the Concord Carlisle Regional School District. And as indicated above, Carlisle does not use the school buses as part of any emergency preparedness plan.

A key element in a successful emergency plan is good communication and working relationship among the parties.

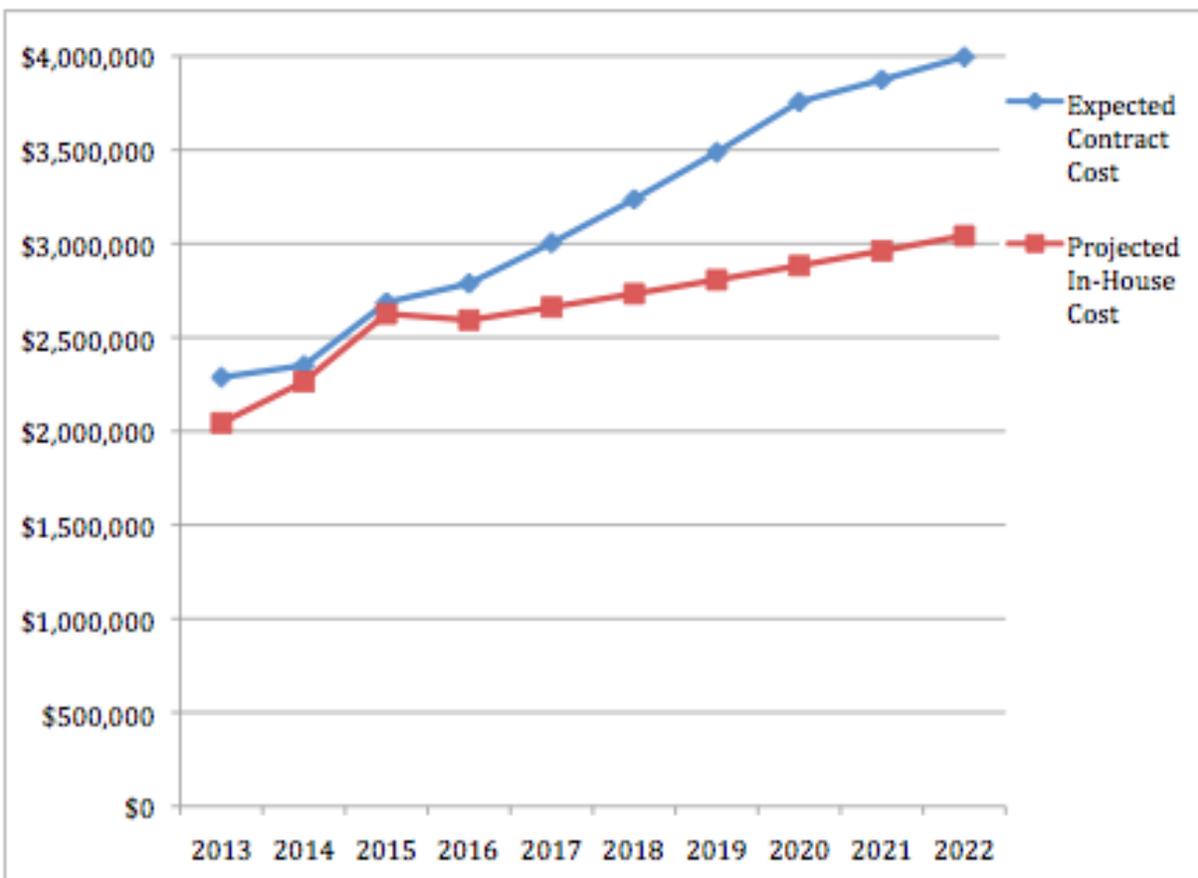
Cost Analysis

Summary of Findings

In February 2012 the school administration sought to contract out the bus transportation service for Concord-Carlisle Regional High School (CCHS) and the Concord Public Schools (CPS), eliminating the in-house transportation staff and transportation facility. In late 2011, the administration sent out an Invitation for Bid to provide the transportation service, but retaining ownership of the buses. In early spring 2012, another IFB was issued. In CTC's analysis, these IFBs provided faulty and misleading cost comparisons biased heavily in favor of contracted service.

As a result CTC decided to build an independent cost comparison, providing a balanced look at costs, looking at a 10 year period to illustrate long-term effects. The following chart compares the expected costs for contracted transportation (based on the results of the IFB from April 2012) versus In-House transportation (as provided by the existing transportation department). Backup data for this chart is provided in Appendix J; explanations for the data used in this chart are provided in the rest of this section.

10 Year Cost Comparison



Differences from School Administration Estimates

The school administration has provided many different numbers for the cost of school bus transportation over the past year. For continuity and completeness CTC used the estimates provided in a memo regarding Transportation Services dated May 3, 2012 from John Flaherty, Deputy Superintendent of Finance & Operations, to Diana Rigby, Superintendent of Schools.

What follows is a list of the biggest problems affecting cost analysis that CTC found in Mr. Flaherty's memo¹⁵, followed by more detailed explanations:

- The removal of the current bus transportation facility was presumed
- The estimate to replace the existing bus transportation facility was inflated:
 - Purchase of land for \$800,000
 - Replacement of buildings instead of moving them, or combining into one building
 - Worst-case estimates for utilities, septic, site work, etc for two buildings
 - Worst-case estimates for bus parking and infrastructure
- The bus replacement schedule was accelerated (8 each year for 2014-2016)
- Employee benefits estimates were overstated
- The level of service specified in the bids for contracted service was incomplete
- A three year bid for contracted service was requested instead of five years
- Only three years of expense projection was used to compare in-house to contracted service
- The temporary Repair Facility rental cost was included for all three years
- "Credit" for Fleet Sale for CCRHS and CPS buses was spread across three years

Some of these assumptions could be viewed as simply ensuring a not-to-exceed estimate. However when put together with persistent round-up errors, and front-loading costs into the first three years, they result in seriously inflated estimates for in-house service.

Transportation Depot Replacement

As discussed in other sections of this document, the site of the current transportation depot on the CCRHS campus, is the best site in terms of investment and operating cost, and functionality. Much discussion has ensued in the Concord community over the past few months about the "requirement" from the new High School Building Program to eliminate the current facility. Reasonable doubt exists from an engineering standpoint that there is much more than an aesthetic rationale for removing it. For reasons that are not entirely clear, eliminating this facility seems to have been a driving force for the attempts to contract out the existing bus transportation service (or perhaps it is the other way around).

CTC therefore looked very carefully at the numbers provided by the school administration to look for possible assumptions that may have crept into the figures and biased the analyses. This included expense projections for in-house operation and cost comparisons to contracted service. The first assumption as described above was of course the presumed requirement to remove the existing facility.

¹⁵ (Many other inaccuracies such as bus safety exist in this document, but this section of the CTC report focuses only on the cost comparison provided in the document.)

The next item that stood out was the estimate of \$2,000,000 to replace the existing facility if the service were to be kept in-house. This number was arrived at by adding estimates for land, replacement buildings and fuel depot, and parking. The estimate for land was based on purchasing buildable (.5 acre for the buildings and fuel depot) and unbuildable (1.5 acre for parking) land in Concord, for a total of \$250,000. If buildable land were used for both, the estimate crept up to \$800,000. If Town or School Department land were used there would be no cost. The \$800,000 estimate was used even though there is no reason to put the parking on buildable land, and in fact there are several Town and School Department properties which could work for both purposes.

The estimate for buildings assumed replacement of the existing facility, with a summary dismissal of moving the Administration building and no discussion of moving the Maintenance building. Nor was any consideration given to combining the buildings should they be replaced. If combined, obvious economies would exist for the single structure, as well as site work and utilities.

The estimate for bus parking and infrastructure (security fencing, lighting, etc) started with an estimate for paving 2 acres at \$100,000 per acre - although it was previously stated that 1.5 acres would be needed for parking. Similarly \$175,000 estimated for infrastructure contained what was stated to be “the worst case cost for subsoil preparation for a two acre paved site”.

In the aggregate the CTC feels that the estimate to replace the existing facility, **if required at all**, is seriously overstated at \$2,000,000.

More realistic options exist for the transportation facility. These options have cost estimates ranging from less than \$200,000 to as much as \$1,200,000, depending on how much is to be moved or replaced, and where. The options include:

- Keep existing facility on CCRHS property, at present location or sited elsewhere
- Keep some of the facility on CCRHS property, and some at another Town/School site
- Rebuild everything at a Town or School Department site

For purposes of the 10-Year Cost Comparison, CTC assumed the third option, with an estimate of \$1,200,000. Note that the transition costs incurred due to construction of the new high school have not been included here or in the 10 Year Cost Comparison.

Bus Replacement Schedule and Cost Estimates

As of June/July 2012, the current CCRHS/CPS bus fleet (Appendix K) consisted of 36 buses with model years between 2000 and 2012 (purchased between 2000 and 2010). 21 were purchased in 2005 and 2006 alone; 2 were budgeted in 2011 and 2012 but not purchased. Some important observations:

- The average age of the buses is 4.5 years (range is 0 to 12)
- The average mileage on the buses is 66,000 miles (mileage range is 4,811 to 160,841)

The school administration's statement of projected need for bus replacement for in-house service is 8 new buses each year for three years(2014-2016), at an estimated \$760,000 per year. Based on national studies of school bus replacement, this accelerated replacement is not justified; even by the school administration's current replacement schedule replacing two-thirds of the buses in 3 years does not make sense.

The **current bus replacement schedule** is stated by the school administration to be based on 10 years of service or 200,000 miles, which amounts to 3-4 per year. Mr. Flaherty's May 3, 2012 memo states that additional bus replacement is needed to include bus purchases deferred from prior years, primarily due to the age of the buses, not mileage.

According to the National Association of State Directors of Pupil Transportation Services, the **recommended bus replacement schedule** should be based on 12-15 years of service or 250,000 miles¹⁶.

Based on this recommended useful life, at most 3 buses will be needed (instead of 16) by 2015, with an ongoing replacement schedule of 2 buses per year after that. CTC used this replacement schedule in the 10-year Cost Comparison for both in-house and contracted service since they will be needed in either case.

CTC urges that the school administration immediately adopt the recommended replacement schedule. Moreover, actual bus replacement each year should be determined by starting with the

¹⁶ see <http://www.nasdpts.org/Documents/Paper-BusReplacement.pdf> page 4 which states:

"... the following anticipated lifetimes under normal operating conditions for different types of school buses are suggested:

Type "C" and "D" school buses -- 12 to 15 years
Type "A" and "B" school buses -- 8 to 10 years

Mileage Considerations: As previously discussed, the life cycle cost study in South Carolina noted that school buses that accumulate mileage more quickly should have replacement decisions based on mileage accumulation rather than age.

According to data published by the Federal Highway Administration, the average annual mileage for all school buses is approximately 8,000 miles. ... many individual school buses accumulate much higher annual mileage. For example, school buses in South Carolina average more than 15,000 miles per year. ... the state believes school buses should be replaced on a 15-year or 250,000 mile cycle.

© January 2002 National Association of State Directors of Pupil Transportation Services. All rights reserved."

replacement schedule and then adjusting based on an annual review of the maintenance for each bus (to determine if maintenance costs might warrant early replacement of a particular bus).

CTC also recommends that the school administration consider the use of a different type of bus as the standard school bus. The use of a front-engine Type D bus instead of rear-engine Type D will result in a lower purchase price per bus, as well as a higher resale value when the buses are ultimately sold.

Not all buses in the current bus fleet are Type D rear-engine buses. An economic case could be made to maintain only one type of bus, leasing non-standard buses instead of purchasing them. This should result in a cost advantage by reducing parts inventory, maintenance training, etc, to only the standard school bus. Alternatively, contracting out the small number of routes where non-standard buses are used could be considered to avoid the additional operational costs.

Personnel Benefits

Personnel benefits (health and retirement), while not listed as a line item in the CCRHS budget, have been included by the school administration in the comparison between in-house operation and contracting out the service. The benefits were based on an estimate from the Town of Concord of \$279,219 for total benefits cost in 2013. This estimate was then inflated by 3% for each subsequent year.

This estimate however also includes some sunk costs and not just the cost avoidance if the Transportation staff were let go. The following information was provided by Tony Logalbo, Finance Director for the Town of Concord.

The estimate includes benefits cost for any past employee already retired and any employee eligible to retire. Eligibility for post-employment health coverage requires that the retiree be receiving or be eligible to receive a public pension, i.e. be "vested." As of May 3rd, there were 32 bus drivers enrolled in the pension system. Of those, 11 had vested with ten years of creditable service. One other current employee is imminently close to vesting. The Town is not obligated for the future benefits of any current employee not yet vested. There are ten more current bus drivers who have worked at least 4.5 years and who will be vested within the next 5.5 years (reaching ten years of service). These employees will be eligible to retire at that point. Thus while the benefits cost elements may be real, a good part of the estimated cost would not disappear from the budget if the transportation department were eliminated.

Immediate savings would be seen in the health premiums paid for active employees. The long-term liabilities would also be reduced if we no longer had these active employees. The best way to measure these savings on a current basis is to use the "normal cost" percentage that the Town's actuary determines. This is a dollar value expressed as a percent of payroll. The best approximation of the true annual employer cost of future benefits is 5% for pension and 5-10% for the Town's 50% share of retiree health premium for life.

Thus, based on 2012 Transportation salaries of \$1,405,710 CTC estimates a benefits cost for 2012 in the range of \$140,057 – \$210,087. Using the midpoint and inflating by 3% yields a benefits cost for 2013 of \$180,323 – roughly \$100,000 less than the school administration's

estimate of \$279,219. \$180,323 was used in the 10 Year Cost Comparison and then inflated by 3% each year.

Note that benefits costs are borne by the Town of Concord for 30 of the drivers. This is required by Massachusetts state law, since these 30 employees work more than 50% of their time for Concord Public Schools. (It would appear to be a cost benefit for Carlisle residents if the Town of Concord bears the benefits cost for 83% of the drivers, and CCRHS bears only the remaining 17%. In contrast, CCRHS driving accounts for 39% of the total driving time.)

There is another potential recommendation that we have not had time or resources to address. The presumption in the school administration's cost comparison is that compensation and benefits levels for transportation employees are significantly higher than for Contract firms offering the same service. If this is the case, a review of level of benefits (and salaries) may be appropriate at least for future years/employees. An independent review conducted with the Town may make sense in the future.

Level of Service

Several differences in the level of service provided by the existing transportation department, as compared to Contracted Service are described in other sections of this document. Many of them, for example supporting the Town's Emergency Preparedness, are hard to quantify in terms of cost and have not been addressed here.

There are some other real costs which appear to have not been considered as the Administration tried to make the case for eliminating the existing transportation service. First is the approximately 29 other school vehicles that are maintained by the transportation department. Maintaining and repairing these vehicles could easily cost \$30,000 per year or more in the private sector. This estimate has been added to the Contracted Cost estimate in the 10 Year Cost Comparison.

The second consideration is the garage that is also on the depot premises, which houses snow equipment, among other things. This additional cost, while not inconsiderable, has not been included here due to lack of time. Provision for this garage is an additional cost that should have been included in the cost of outsourcing. It is important however that it be addressed in the school administration's final transition plans.

Cost Comparison

When going out for bid for contracted bus transportation, a big concern should be that the bidders may low-ball their prices in order to get the contract, and make it up in subsequent years. Once the bus fleet is sold it would be a massive investment to bring it back in-house and purchase the buses again. In our case it would be on the order of \$3.6 million, and then the buses would all need replacement at the same time after 12-15 years.

To partially protect against low-balling, a longer contract term, such as 5 years, is normally recommended. In the school administration's November 2011 IFB which retained fleet ownership but leased the buses to the contract firm, a 3 year contract was specified with 2 option years. For some reason the second IFB in March 2012 specified only a 3 year contract. This raises concern about cost increases after the initial contract term expires.

This need for this concern is borne out in studies that have been done on School Transportation, and privatization in particular. For example, the “Study of Ohio Public School Transportation Privatization 1994-1998”¹⁷ says:

“Perhaps the most central question is, ‘Why does it appear that contracting districts are so much more costly than non-contracting districts?’ There are a number of possible explanations, each worthy of further research. The most straightforward explanation is that vendors charge more than what it costs districts to run their own service. In exchange for the administrative freedom to focus exclusively on ‘instructional services,’ school districts and communities pay a premium to contractors.”

The Ohio study quantifies the cost of this premium per student transported as ranging from 23.6% to 50.2% during the period 1994-1998, with 33% being the most recent.

The Keystone Research Center’s “Study on the Cost of Student Transportation Services in Pennsylvania, 1986-2008,”¹⁸ was more recent, and most conservative (lowest) in terms of price increases for contracted services. More importantly for the purposes of this report, it captured the **inflation-adjusted** transportation spending in the five years after the initial contract: “29 districts that privatized transportation services between 1992 and 2001 reveals that these districts experienced a **26%** increase in total transportation costs in the five years after contracting out compared to a **6%** increase in the five years before contracting out.”¹⁹

CTC has used this figure (26% increase over 5 years, in addition to 3% inflation per year) for the period following the third year of the contract bid. In contrast, in-house service assumes 3% inflation for each year.

The use of a 10 year cost comparison demonstrates the impact of this effect. It also smooths out the costs of in-house and contracted service, and allows the “credit” for the sale of the bus fleet (if contracting out) to be spread over 10 years (Note that this still assumes that the school administration is allowed use of the Concord Public School fleet proceeds towards vendor costs, this has not been confirmed.)

The Cost Comparison does not include the temporary rental cost of the Repair Facility in Billerica; it presumably would be needed in either alternative for a year, but it’s not clear that it would be needed longer than that. It also does not include any other transition costs while the new High School is being built, but concentrates on the long-term cost of bus transportation.

To summarize all these cost differences, in developing the 10 Year cost comparison CTC started with the numbers provided by Mr. Flaherty in his May 3, 2012 memo.

- Contracted service numbers were based on the “2nd bid – Without Fleet Ownership” cost analysis (“1st Bid – Retained Fleet Ownership” included an **additional** 15 buses over the first 3 years), with the following adjustments:

¹⁷ <http://www.afscme.org/news/publications/privatization/taking-them-for-a-ride-an-assessment-of-the-privatization-of-school-transportation-in-ohios-public-school-districts>

¹⁸ <http://keystoneresearch.org/publications/research/school-bus-transport>

¹⁹ See also An Analysis on the Contracting Out of School Support Services in Oregon 2003, <http://pages.uoregon.edu/lerc/public/pdfs/costsconsidered.pdf>

- The bid for 2015 was inflated by 3% + 4.73% per year for the next 5 years
- The credit for the sale of the fleet was spread over 10 years (CCHS **and** CPS buses)
- Replacement buses added for 2015 (3) and beyond (2 per year)
- Repair Facility Rental was not included
- Maintenance for an additional 29 school vehicles was added and inflated by 3% per year
- In-house transportation used the base 2013 budget for the transportation department, with the following adjustments:
 - The budget was inflated by 3% per year for 10 years
 - \$1,200,000 for the transportation facility²⁰ was added as debt service for a ten year bond; this normalizes its impact by spreading over 10 years.
 - Replacement buses added for 2015 (3) and beyond (2 per year)
 - Rental for the repair facility was not included.
 - Retirement benefits were added to 2013 at 5% of salary, and inflated 3% per year
 - Health benefits were added to 2013 at 7.5% of salary, and inflated 3% per year

As a final note, the 10 year period from 2013 through 2022 is still being used; adjustments can be made to update the comparison to 2014 through 2023 if necessary, although assumptions about contractor pricing would be needed.

²⁰ To test the sensitivity of this cost comparison to other options for relocating/rebuilding the transportation facility, additional data was entered to represent costs of \$200,000 and \$2,000,000 for the debt service for in-house transportation. These comparisons are included in Appendix J in addition to the cost of \$1,200,000.

Site Selection

The selection of a site for the transportation department requires consideration of the land and location as well as the capital improvements necessary to use that site. Consensus opinion both within and outside the Committee is that the ideal location should be able to support all the functions of the department - administration, maintenance, fueling, and parking, both for buses and employees. The ideal location should also be centrally located, to minimize extra travel time before and after bus routes. The Committee looked at what exists in the current facility, what would be required to replace it, and at five locations within the Town of Concord. Preference was given to sites already owned by either the Concord Public Schools or by the District, and then to sites owned by the Town. The Committee concluded that the best available option is the current site at Concord Carlisle High School.

The existing facility consists of a three-bay maintenance building of approximately 3900 square foot, a 1440 square foot modular office building, a 5000 gallon fuel tank and associated pumping station, safety fencing and lighting, and an additional building that houses the school's sand/salt truck. The modular building includes a reception area, two offices, a day room that is also used for training, and restroom facilities. The facility also includes parking for the buses and for the bus drivers and mechanics. Similar parking facilities would be required at any new location, with an ideal size of approximately 2 acres.

If the transportation department is moved, clearly all the functions of the existing facility will need to be replicated. There is no need, however, to duplicate the existing facility exactly. In particular, there would be no need to build two buildings to house maintenance and administration separately. A single larger building is likely to be at least as useful as well as being more energy efficient and cheaper to build. The Committee therefore determined, in discussion with a variety of builders, that a 4800 square foot building (60x80) would be able to accommodate two or three bays, offices, a day room/training room, a reception area, restrooms, and storage. A rough cost estimate for this structure would be between \$480,000 and \$600,000, which would cover all construction costs excluding site preparation and utility hookups. Similarly, paving a 2 acre site to a standard that will meet the needs of school buses would cost between \$185,000 and \$250,000, that estimate covering grading and paving only.²¹

Committee's Priority order	Site	Cost to Improve	Comments
1	Current location at CCHS	\$0.00	No costs or modifications required. Positives: Site already exists. Has all needed improvements and is relatively central. Negatives: Conflict about whether the new school requires that the site be destroyed.

²¹ For information on the sources for these various estimates, see Appendix Q

Committee's Priority order	Site	Cost to Improve	Comments
2	CCHS Student Parking Lot	~\$1 million to \$1.1 million	<p>New maintenance building required (moving existing building would not be cost effective). Lot is on top of the old landfill, which must be remediated. Possibly paving the area to support buses could be part of the capping process. Because the site is part of the larger CCHS property, it would be possible to install a new fueling station. Such a station would have to be brought up to code and require a special permit from the Zoning Board of Appeals (ZBA). The ZBA has indicated it would be supportive of this action if the new design ensured safety, with features such as double or triple walls on the tank, an overflow tank, and an alarm system connected to the Police and Fire Departments.</p> <p>Positives: No land cost, is relatively central. Negatives: Uncertainty about timeline for landfill remediation. Concerns from Bristers Hill Road neighbors.</p>

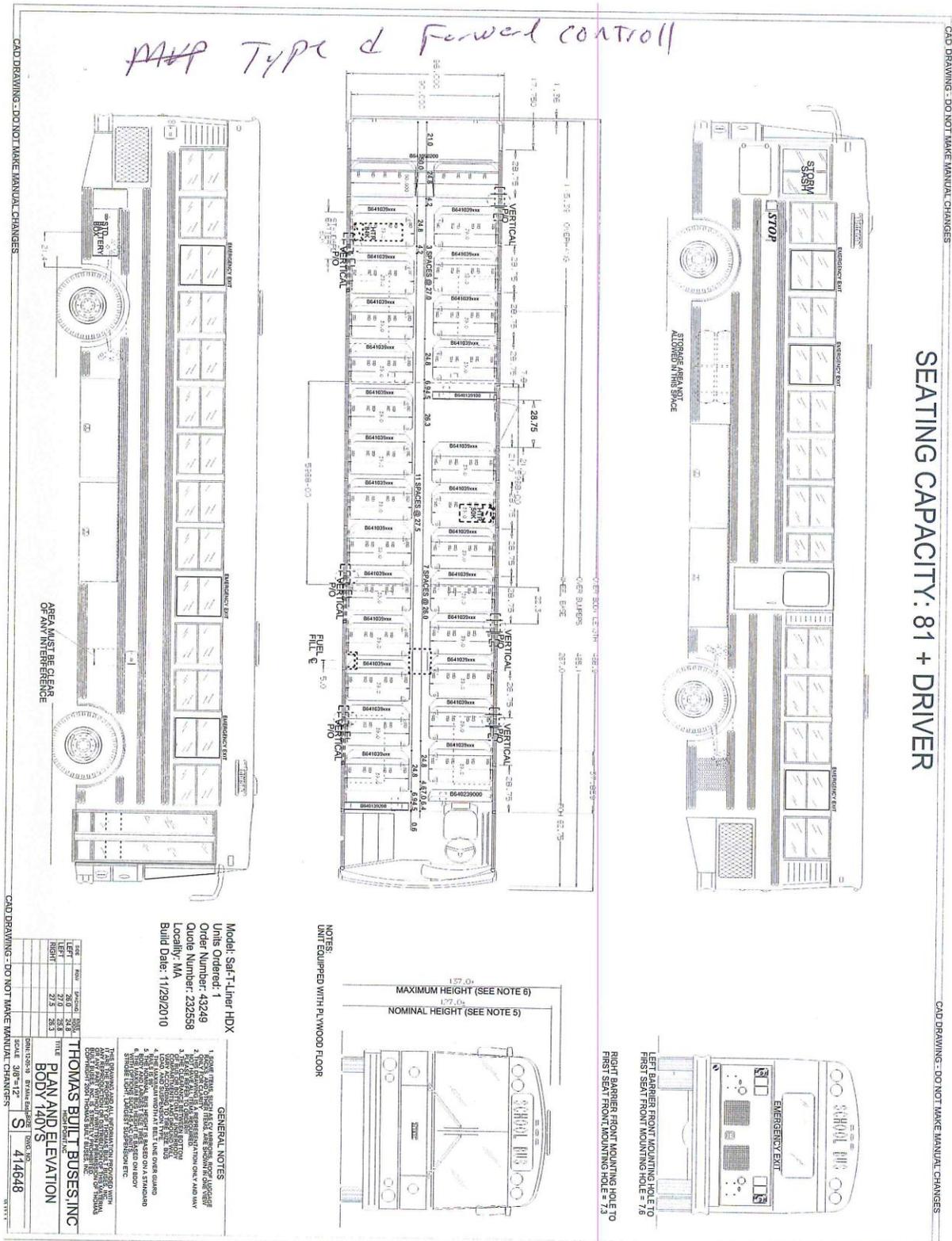
Committee's Priority order	Site	Cost to Improve	Comments
3	Concord Landfill (the "new" landfill).	~\$1 million to \$1.1 million	<p>Controlled by the Board of Selectmen. The School Committee would need to make a written request that the land be transferred to their custody for educational use. The facility would need to be constructed. A permit would be required from DEP. Methane is present on the site, although the specific site in question was never actually used as a landfill. Methane would have to be considered with respect to the building (i.e. proper ventilation), but would be very manageable. General view is that DEP would be supportive of the project.</p> <p>Positives: Re-use of land which has little value for anything else. Relatively central (not far from current site).</p> <p>Negatives: All buses would have to cross or get on Route 2 multiple times daily. Walden Woods has again expressed interest in purchasing a conservation restriction from the Town on the property.</p>
4	Ripley School (Burke and Ammendolia land)	~\$1 million to \$1.1 million	<p>Facility would need to be constructed. The land was acquired for educational purposes (i.e. school use). A special permit would be required due to the presence of wetlands.</p> <p>Positives: Relatively central location, no land cost.</p> <p>Negatives: Closer to residential neighborhood than other sites.</p>

Committee's Priority order	Site	Cost to Improve	Comments
5	Town land adjacent to CMLP	~\$1 million to \$1.1 million	<p>Would require building, a parking lot, a driveway to that lot, plus all required improvements. A 1500 gallon fuel tank is on site--it would need to be enlarged or replaced. Site owned by town. Town Manager has indicated the town would be willing to have a bus depot there. Would require an NRC permit due to wetlands.</p> <p>Positives: No land cost. Might be benefits to sharing some of the facility with CMLP and CPW.</p> <p>Negatives: Not at all central. Virtually all buses would have to negotiate the rotary 4 times daily.</p>

Conclusion & Recommendations

The School Transportation Department should continue to be operated directly by the schools. The existing department is integrated into the school community as well as into the town at large, in a manner which a private contractor would not necessarily be able to match. Private contractors cannot offer the same level of service as the transportation department can for a competitive price. Private contractors have no advantage in safety, and their maintenance record is considerably worse than the department has historically provided. The transportation department should reside in a central location that can support all the necessary functions-- maintenance, administration, fueling, bus parking, etc. The current location, on the campus of CCHS, meets these criteria better than any other available site the Committee considered. Although the transportation department is less expensive than a private contractor would be, some reductions in expenses might be possible through more careful planning on the part of the school administration with respect to fuel costs, route assignment, and purchase specifications.

Appendix A: Type D Bus Diagram



Appendix B: Transportation Dept Pre-Run Checklist

○ ○ ○
Untitled

Bus No.: _____ Date: _____

Driver: _____

Start Mileage: _____ End Mileage: _____

1. In the columns provided, enter the appropriate inspection codes for each trip taken:
X - QUESTIONABLE O - DEFECTIVE

2. If (X) or (O) is entered for any item, please explain in the comment section below.
Items not noted have no known defects

<input type="checkbox"/> Engine <input type="checkbox"/> Service Brakes <input type="checkbox"/> Parking Brake <input type="checkbox"/> Wheels / Tires <input type="checkbox"/> Body Damage / Paint <input type="checkbox"/> Exterior Lights / Flashers <input type="checkbox"/> Reflectors <input type="checkbox"/> Steering Mechanism <input type="checkbox"/> Horn <input type="checkbox"/> Windshield Wipers <input type="checkbox"/> Mirrors	<input type="checkbox"/> Exhaust System <input type="checkbox"/> Glass <input type="checkbox"/> Interior Lights <input type="checkbox"/> Emerg. Exits / Buzzers / Triangles <input type="checkbox"/> First Aid Kit / Fire Extinguishers <input type="checkbox"/> Driver / Passenger Seats <input type="checkbox"/> Doors / Windows <input type="checkbox"/> Heat / Air Conditioning <input type="checkbox"/> Gauges <input type="checkbox"/> Cleanliness <input type="checkbox"/> Other: _____
---	--

DRIVER COMMENTS: _____

I have reviewed the previous DVIR, performed a pre-trip inspection and find:

NO DEFECTS DEFECTS AS NOTED

Condition of the above vehicle is: SATISFACTORY UNSATISFACTORY

Pre-Trip Signature: _____

I have performed a Post-Trip Inspection, checked for remaining students or belongings and find:

NO DEFECTS DEFECTS AS NOTED

Post-Trip Signature: _____

MECHANIC'S COMMENTS: _____

Above Defects Corrected
 Above Defects Need Not Be Corrected For Safe Operation of Vehicle

Mechanic's Signature: _____ Date: _____

Driver Reviewing Repairs: Signature: _____ Date: _____

massDOT MASSACHUSETTS REGISTRY OF MOTOR VEHICLES
 SCHOOL BUS INSPECTION FORM (10-2007)

Date _____

Operator: _____ Location: _____

VIN: _____ Reg. #: _____ Odometer _____

Body Manufacturer: _____ Body Year: _____ Body Type: A B C D Lift Equipped: Y N

Chassis Manufacturer: _____ Chassis Year: _____ Bus Number: _____ Reinspection?: Y N

COMMENTS required for all fails and equipment defects: _____

- BODY INTERIOR**
- BUS IDENTIFICATION** 1. []
 registration, plates, VIN, inspection sticker.
- SAFETY EQUIPMENT** - fire ext., first aid kit, 2. []
 body fluid clean up kit, reflectors, chock blocks, belt cutter
- DRIVER'S SEAT** - adjust, seat belt 3. []
- STEERING** 4. []
 wheel, column, horn, directional indicator, 4-way
- BRAKE, CLUTCH** 5. []
 brake operation, starter interlock
- GAUGES** - speedometer, oil, air, vacuum, volt, 6. []
 amp, brake warning, school bus monitor board
- WINDSHIELD** - glass, wipers, washers, sun shield 7. []
- MIRROR** - interior, sun shield 8. []
- SERVICE DOOR** - operation, seals, padding 9. []
- INTERIOR LIGHTS** 10. []
- HEATER, DEFROSTER** 11. []
- FLOOR COVERING, AISLE** - steps, step well, 12. []
 nosing, hand rail
- SEATS, RESTRAINING BARRIERS** 13. []
 secured, proper tape repairs, upholstery, seat belt operation if equipped
- EMERGENCY DOOR** - operation, locking device, 14. []
 seals, alarm, decals, light, padding
- EMERGENCY WINDOWS, ROOF HATCHES** 15. []
 operation, buzzer, decals
- WINDOWS** 16. []
 operation, sash, frames, glass, latches
- INTERIOR BODY PANELS** - ceiling, side, 17. []
 wheel housing, any sharp edges
- CLEANLINESS** - trash receptacle & broom 18. []
- BODY EXTERIOR**
- LIGHTS** - head, marker, stop, tail, directional, 19. []
 reflectors, backup light/alarm
- FRONT WHEEL** - bearings, kingpins, lugs, seals 20. []
- FRONT TIRES** 21. []
- MIRRORS AND BRACKETS** 22. []
 rear view, cross view
- SCHOOL SIGNS** 23. []
- SCHOOL LIGHT SYSTEM** 24. []
- STOP ARM** - if equipped crossing arm 25. []
- BODY** - panels, rub rail, bumpers 26. []
- HOOD, LOCK, BATTERY** 27. []
- STIRRUP STEPS** 28. []
- REAR WHEELS** 29. []
 lugs, flange bolts, leaks
- REAR TIRES** - including mud flaps 30. []
- LETTERING** - vehicle markings, owner, operator, 31. []
 bus number, roof number, unlawful to pass, R/R crossing, 100'
- CHASSIS**
- STEERING** - gearbox, pump, hoses, leaks 32. []

- CHASSIS (Con't)**
- pitman arm, draglink, tie-rod ends
- EXHAUST SYSTEM** - leaks, hangers 33. []
- FRONT AXLE** - springs, shackles, U-bolts, 34. []
 shock absorbers, air suspension
- HYD BRAKES** - brake lines, connectors, leaks 35. []
 wheel cylinders, hydrovacs, drums
- AIR BRAKES** - valves, cams, chambers, lines, 36. []
 linings, drums, leaks, adjustments
- TRANSMISSION** - leaks, mountings 37. []
- EMERGENCY BRAKE SYSTEM** - operation, 38. []
 low air warning, adjustment
- DRIVE SHAFT** - universal joints, guards 39. []
- REAR AXLE** - differential leaks, leaks, springs, 40. []
 shackles, U-bolts, shock absorbers, seals, air suspension
- FRAME** - cross members, outrigger, unbody 41. []
- FUEL SYSTEM** - lines, brackets, leaks, fuel 42. []
 tank cage
- ENGINE COMPARTMENT**
- AIR CLEANER** 43. []
- ELECTRICAL SYSTEM** - secured, wiring. 44. []
- BELTS** 45. []
- HEATER VALVES** 46. []
- ENGINE** - leaks, critical components 47. []
- SPECIALLY EQUIPPED SCHOOL BUSES**
- WHEELCHAIR LIFT/RAMP** 48. []
 wheelchair securement, door open signal, restraint system
- INSPECTED BY:**
- Inspector Signature and Badge Number _____
- Copy Received by _____
- Equipment Defects Have Been Corrected (authorized signature)* _____
- Title/Date _____
- *Must mail within (7) days to: RMV, Vehicle Safety & Compliance Services, ATTN: School Bus Compliance, P.O. Box 55892, Boston, MA 02205-5892.**
- INDICATES PASS
- F | INDICATES FAIL (Do NOT sign and return form. You must call RMV for reinspection of bus after repairs are made)
- E | EQUIPMENT DEFECT # _____ (repair defects and return signed form to RMV)
- ER | EQUIPMENT DEFECT (same day repair) | FR | FAIL (same day repair)
- STICKER # ISSUED: _____
- OUT OF SERVICE DECAL ISSUED - YES | | NO | |

Appendix C: Massachusetts DOT school bus inspection form

Appendix D: History of Administration Safety Statistics

In May, the school administration presented the following table of safety statistics to the school committee.

A table comparing our internal safety statistics to those of private vendors who have submitted bids in our two IFB cycles, and some local private carriers follows for the School Committees consideration:

Concord Public Schools & Concord-Carlisle Regional School District
April 30, 2012

	2-Year Continuous Data							
	Previous 2-Year Accident Record	Previous 2-Year Recorded Miles Driven	Total 2-Year Buses per Entity	Total 2-Year Drivers per Entity	Accidents per Million Miles Driven	Accidents/ Bus	Accidents/ Driver	Miles Driven Between Accidents
Illinois Central School Bus ²	26	62,396,790	6,772	6,796	0.4167	0.0038	0.0038	2,399,877
First Student ²	636	1,324,000,000	94,526	86,000	0.4804	0.0067	0.0074	2,081,761
Durham School Services ²	249	381,338,728	23,962	25,042	0.6530	0.0104	0.0099	1,531,481
Local Motion ²	7	8,448,000	264	288	0.8286	0.0265	0.0243	1,206,857
C & W Transportation ²	5	1,280,000	86	100	3.9063	0.0581	0.0500	256,000
CPS & CCRSD ¹	28	600,000	72	72	46.6667	0.3889	0.3889	28,571
Dee Bus Service ²	10	N/A	326	328	N/A	0.0307	0.0305	-

¹ Source: CPS/CCRSD Transportation Manager Wayne Busa and MIA Insurance for 24 month period March 2010 to March 2012.

² Source: U.S. Department of Transportation, Federal Motor Carrier Safety Administration; previous 24 month data March 2010 to March 2012.

The range of miles driven between accidents for the carriers above is 28,571 miles to 2,399,877 miles. The data indicates that private carriers who submitted bids and local private bus vendors experience a significantly lower rate of accidents per million miles driven than our CPS-CCRSD transportation department.

According to this table Concord/Concord-Carlisle's buses have a lot more accidents per mile (9-times that of C&W Transit (Lexington) and 72-times First Student's (Sudbury and part of Lincoln)).

Fortunately, the School Committee noticed an error in the table (as noted in the meeting minutes)

Mr. Fondriest asked Mr. Flaherty to revise safety information into a format that compares like information to like information.

Mr. Flaherty and his staff made the revision, which is shown below. This table leads one to believe that Concord/Concord-Carlisle's buses get into accidents 13 time more often than First Student's buses and twice as often as C&W. The assertion of this table is that Concord/Concord-Carlisle's buses get into accidents a lot more often. For this reason, we contacted the Massachusetts Registry of Motor Vehicles and received a copy of their school bus accident data for the state covering 2002-2010. Analyzing the RMV data we concluded that Concord/Concord-Carlisle, First Student, and C&W have roughly identical accident rates in our region.

Concord Public Schools & Concord-Carlisle Regional School District
May 21, 2012

CPS & CCRSD Historical Annual Data ¹								
	Total Annual Accidents	Total Annual Miles	Total Buses	Total Drivers	Accidents per Million Miles Driven	Accidents/ Bus	Accidents/ Driver	Miles Driven Between Accidents
FY06	9	300,000	36	36	30.0000	0.2500	0.2500	33,333
FY07	7	300,000	36	36	23.3333	0.1944	0.1944	42,857
FY08	13	300,000	36	36	43.3333	0.3611	0.3611	23,077
FY09	14	300,000	36	36	46.6667	0.3889	0.3889	21,429
FY10	7	300,000	36	36	23.3333	0.1944	0.1944	42,857
FY11	14	300,000	36	36	46.6667	0.3889	0.3889	21,429
FY12	10	300,000	36	36	33.3333	0.2778	0.2778	30,000
TOTAL	74	2,100,000	252	252	35.2381	0.2937	0.2937	28,378

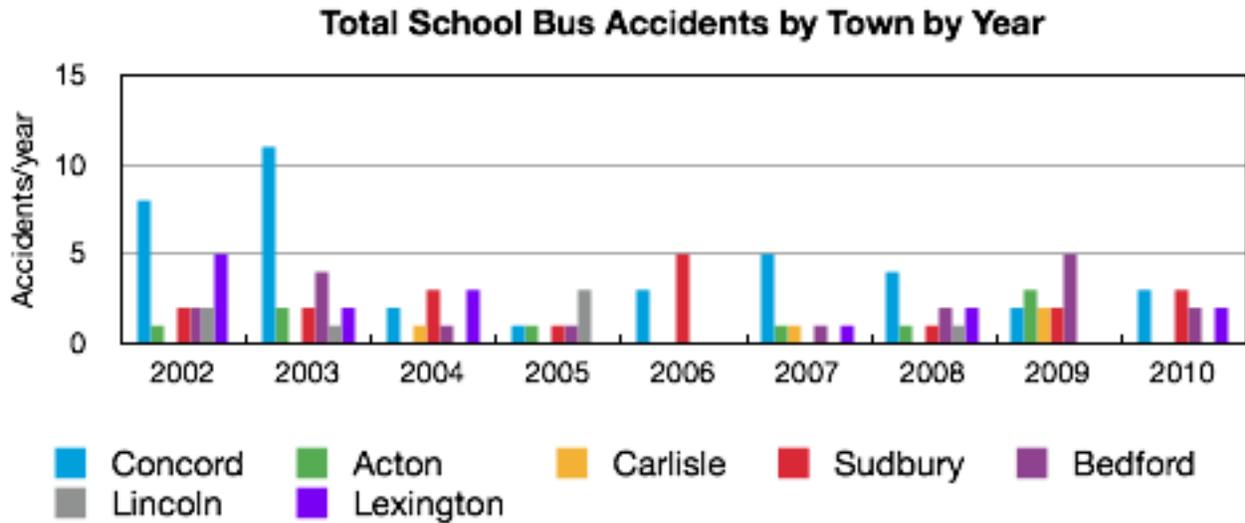
2-Year Continuous Data - All Accidents								
	Previous 2-Year Accident Record	Previous 2-Year Recorded Miles Driven	Total 2-Year Buses per Entity	Total 2-Year Drivers per Entity	Accidents per Million Miles Driven	Accidents/ Bus	Accidents/ Driver	Miles Driven Between Accidents
Illinois Central School Bus ²	26	62,396,790	6,772	6,796	0.4167	0.0038	0.0038	2,399,876.54
First Student ²	636	1,324,000,000	94,526	86,000	0.4804	0.0067	0.0074	2,081,761
Durham School Services ²	249	381,338,728	23,962	25,042	0.6530	0.0104	0.0099	1,531,481
Dee Bus Service ²	10	N/A	326	328	N/A	0.0307	0.0305	-
C & W Transportation ²	5	1,280,000	86	100	3.9063	0.0581	0.0500	256,000
CPS & CCRSD ¹	28	600,000	72	72	46.6667	0.3889	0.3889	21,429
Local Motion ²	7	8,448,000	264	288	0.8286	0.0265	0.0243	1,206,857

2-Year Continuous Data -Categorized ³ per FMCSA Methodology								
	Previous 2-Year Accident Record	Previous 2-Year Recorded Miles Driven	Total 2-Year Buses per Entity	Total 2-Year Drivers per Entity	Accidents per Million Miles Driven	Accidents/ Bus	Accidents/ Driver	Miles Driven Between Accidents
Illinois Central School Bus ²	26	62,396,790	6,772	6,796	0.4167	0.0038	0.0038	2,399,876.54
First Student ²	636	1,324,000,000	94,526	86,000	0.4804	0.0067	0.0074	2,081,761
Durham School Services ²	249	381,338,728	23,962	25,042	0.6530	0.0104	0.0099	1,531,481
Dee Bus Service ²	10	N/A	326	328	N/A	0.0307	0.0305	-
C & W Transportation ²	5	1,280,000	86	100	3.9063	0.0581	0.0500	256,000
CPS & CCRSD ³	4	600,000	72	72	6.6667	0.0556	0.0556	150,000
Local Motion ²	7	8,448,000	264	288	0.8286	0.0265	0.0243	1,206,857

¹ Source: CPS/CCRSD Transportation Manager Wayne Busa and MIA Insurance for 24 month period March 2010 to March 2012.

² Source: U.S. Department of Transportation, Federal Motor Carrier Safety Administration; previous 24 month data March 2010 to March 2012.

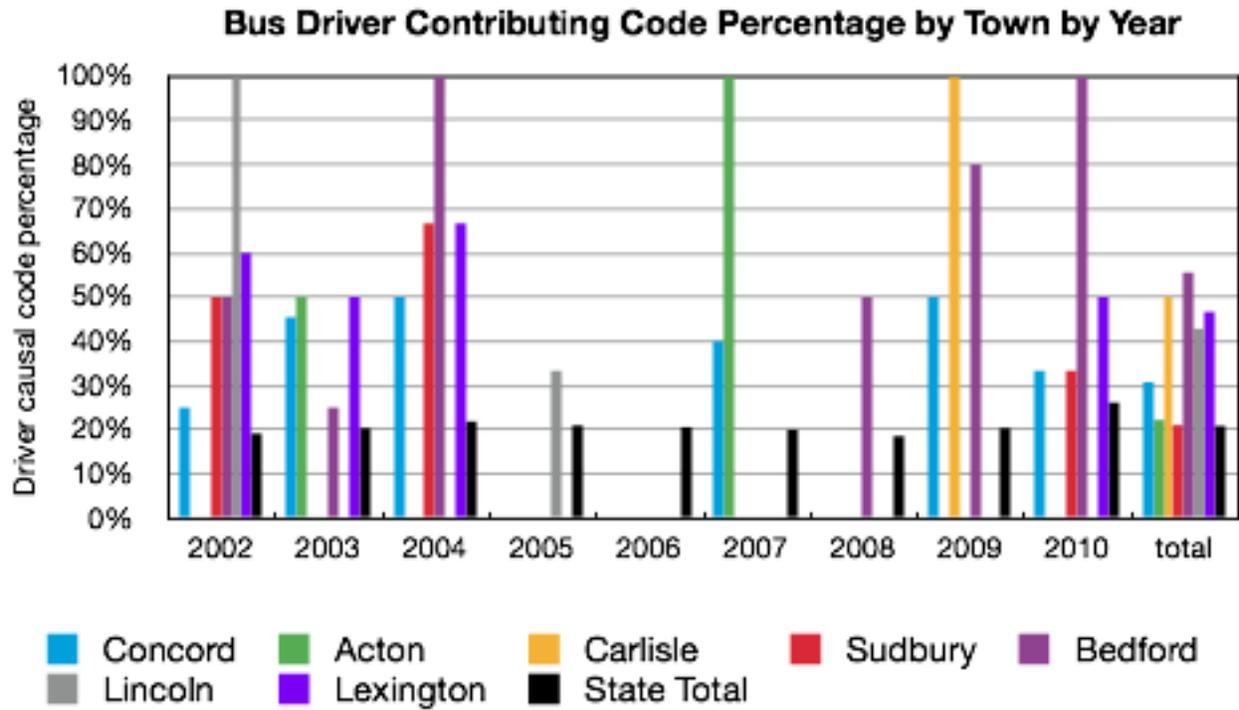
³ Accidents that resulted in a fatality, injury, or tow-away as defined by the Federal Motor Carrier Safety Administration (3 injuries, 1 tow-away).



Appendix E: School Bus Accident Statistics

The chart below reflects the data from page 15 in visual form (total omitted to improve visibility of yearly data):

Applying bus driver contributing codes for each accident to determine the bus driver contributing percentage by year produces the chart below. The annual samples by town are highly variable. The choice of years can have a large effect on the results. (We've used everything the RMV could provide.) Having more years smoothes the result as can be seen in the 'totals' column group.



This chart vividly illustrates the smoothing effect of a larger sample of accident data. Each year's "State Total" is close to 21%, the 9-year average.

Appendix F: Why are CTC statistics different?

CTC's analysis differs from the administrations in the following ways:

- The CTC analysis was developed from a single database, the Massachusetts RMV accident data, making comparisons between towns consistent.
- The administration used Concord/Concord-Carlisle's insurance claims for Concord/Concord-Carlisle and the Federal Motor Carrier Safety Administration (FMCSA) accident data for contractors, which complicated comparison of Concord/Concord-Carlisle's accident rate to contractors because the insurance company and FMCSA define accidents differently.
- The RMV collects accident records from police using a uniform system. In house school buses are treated the same as contractor buses.
- The CTC results cover 9 years; the administration's only 2. The longer timeframe reduces statistical fluctuations.
- RMV accident records fail to identify vehicle's owners. So if a bus from Maynard gets in an accident while in Concord, the CTC analysis assumed it was a Concord/Concord-Carlisle bus; conversely if the Concord/Concord-Carlisle METCO bus has an accident in Boston, the CTC analysis assumed it was a Boston bus. The CTC analysis therefore assumes that most school bus accidents in a town involved that town's bus service. The administration's results reliably identify ownership.
- A possible problem with the FMCSA data is consistency between carriers. Why is C&W's accident rate 6 times that of First Student? The CTC accident analysis does not support that conclusion. C&W is a small firm located in Lexington. First Student is multinational. It may be that driving conditions in suburban Boston are particularly difficult, in which case First Student's accident rate in Sudbury might be more like that of C&W or Concord/Concord-Carlisle. This inter-company inconsistency deserves further investigation, but it is beyond the scope of this report.

How were relevant accidents selected from the RMV data?

From all school bus accidents in the RMV database the CTC analysis first selects accidents involving buses that carry more than 15 people. This is as close to the C and D type buses used in Concord as possible while excluding accidents involving smaller school buses: cars and vans.

What does "Percentage possibly contributed to by the school bus driver" mean?

No one can say for sure what causes an accident. Police record their assessment of driver contributing codes on the RMV accident form. The table below lists the codes police assigned to school bus drivers in the selected accident. This analysis tags certain codes as "possibly contributory" to causing the accident, as also listed in the table below. This assignment is a judgment that may or may not be valid. It was done 'blind' and applied to all towns uniformly. These codes thus determine the percentage of accidents possibly contributed to by the school bus driver.

From 2002-2010 the data base contained 4830 driver contributing codes. This table lists the codes assigned to bus drivers in descending order based on how many times a code was assigned. (Sometimes more than one contributing code is assigned per accident which is why for 4519 accidents police assigned 4830 contributing codes.)

School Bus Driver Contributing Code	State total 2002-2010	Possibly Contributory
(No improper driving)	2,632	No
()	650	No
(Unknown)	375	No
(Inattention)	290	Yes
(Failed to yield right of way)	160	Yes
(Other improper action)	139	Yes
(Failure to keep in proper lane or running off road)	105	Yes
(Made an improper turn)	87	Yes
(Followed too closely)	77	Yes
(Visibility obstructed)	65	No*
(Over-correcting/over-steering)	63	Yes
(Swerving or avoiding due to wind; slippery surface; vehicle; object; non-motorist in roadway; etc)	41	No**
(Distracted)	39	Yes
(Operating vehicle in erratic; reckless; careless; negligent or aggressive manner)	24	Yes
(Wrong side or wrong way)	11	Yes
(Driving too fast for conditions)	10	Yes
(Glare)	7	No
(Exceeded authorized speed limit)	6	Yes
(Illness)	5	Yes
(Operating defective equipment)	4	Yes
(Emotional)	3	Yes
(History heart/epilepsy/fainting)	3	Yes
(Fatigued/asleep)	1	Yes
(Computer)	1	No
total	4,830	

*Unknown - might be due to temporary problem out of control of the driver.

**Unknown - might be due to avoiding swerving cyclist or a child that ran into street.

Appendix G:CTC Meeting with Transportation Staff

Notes from CTC meeting with Transportation staff, June 21, 2012

Attendees: John Arena, Transportation Coordinator
Lisa Bergen, CTC
Wayne Busa, Transportation Manager
Mark Hanson, CTC
Joe Signor, mechanic
Matt Wells, Business Analyst

Overview

CTC members Mark Hanson and Lisa Bergen met with Wayne Busa, John Arena and Joe Signor to get a better understanding of the issues related to bus, driver, and student safety. Matt Wells attended at John Flaherty's request. The following questions were asked. Answers are below the questions.

Bus safety

Q. What is the routine bus maintenance schedule per bus?

A. Tuesdays all buses have oil, fluids, engine and mileage checks. This covers 36 buses and 29 school department vehicles

Preventative maintenance is done every 3000-5000 miles, includes oil change, checking tires, and brakes. There is a checklist that is used to assure complete maintenance work is performed. Each driver is required by law to conduct a pre and post-trip inspection of the bus. Should there be a concern, the driver would fill out a maintenance slip to let the mechanics know something needed attention.

If a bus has a problem on the road, the driver will call in over the two-way radio.

Mechanics will try to triage over the radio, asking for gauge readings. If they cannot diagnose or fix via radio, the mechanic will go to the bus in the repair truck. If necessary a second mechanic will come with a replacement bus to make sure students get to their destination safely.

First priority is always student safety and then getting students to their destination.

Q. How often does a bus have to be sent out for repairs that cannot be done in house?

A. If the bus is under warranty it would be sent to the warranty service provider.

If the transportation department does not have the software on-site for a diagnosis, then the bus would be sent out to the appropriate service location, i.e., Dedham for a Cummins engine repair, or Milford for Thomas-made buses.

Buses may also be sent out for transmission repairs.

Q. How often are buses inspected by the state?

A. Buses have an annual inspection for registration.

The RMV also schedules an inspection on each bus three times a year. Typically the RMV checks 12 buses per day. This is a complete mechanical and safety equipment inspection.

- Q. Are there federal inspections as well?
Drivers are required to have their vehicle inspection book on the bus. Also, if any master lights are out (red flashing lights) the bus is considered out of service and may not be driven by law.
- Q. What is our failure rate for inspections?
There has been one bus put out of service during an RMV inspection.
- Q. What add-on features do we have on our buses that we purchased for safety? For example, can a bus driver see the lower side of the bus using the rear view mirrors?
- A. With the exception of back stop arms and cameras, all buses come standard with all available safety features. For example, there is a child check button at the back of the bus. This requires the driver to walk to the back of the bus and press the button – insuring a check of each seat.

Driver safety

- Q. The contract calls for eight safety training sessions per year per driver. Is that what we do?
- A. Federal law requires a minimum of eight hours of safety training. The Transportation Department offers 12-15 hours, roughly one training session per month, available to all drivers. These are posted in the Day Room in advance.
- Q. What do these training sessions cover? Is it a fixed program, changing?
- A. Some are standard and an expert may be brought in to present information. Some are video training sessions. Topics can vary, depending on driver requests and manager discretion and new regulations.
- Q. Do our training programs conform to state, local, federal (NTSB, FHA) or union standards?
- A. Our driver training exceeds all required minimums.
- Q. What first aid, safety, and bullying training do the drivers receive?
- A. Drivers receive the same training in first aid, bullying, and open circle training as teaching staff.
Each driver has a list of the students on their bus which includes allergy information. This list is kept confidentially on the bus with the driver. (other medical information?)
- Q. How are the radios used for safety? Examples?
- A. The buses have 2-way radios that are tied in with the police and fire department. The Metco drivers have push-to-talk phones.
- Q. Describe the process for selecting and training new drivers. Is there a try-out/probationary period?
- A. The transportation department Manager interviews driver and takes them on a road test. This is graded. If the driver passes the road test they then interview with John Flaherty and Human Resources. Candidate must have a physical, a CORI check and their driving record is checked. Newly hired drivers are on a six month trial period during which the

transportation manager monitors their driving closely. At any time, should a driver fail to meet safety standards, they can be let go.

All drivers are subject to random drug testing (state/federal law), and an annual physical. They are also required to carry their medical card with them when driving.

- Q. How much discretion does management have for deciding whether a driver should be let go?
- A. The Transportation Manager monitors new drivers carefully during trial period. Drivers have been let go if their driving behavior does not meet expectations. There is a process in place to discipline or terminate an employee. The Superintendent makes the final decision on such matters.

Depot safety

- Q. Is the depot lit at night?
- A. Yes.
- Q. Is the depot fenced and is it locked after hours?
- A. The bus area is fenced and the gate is locked after hours.
- Q. Generally, how are the buses kept safe?
- A. Buses are not locked, but the perimeter fence is locked after hours for safety. Drivers typically use the same bus and carry the key with them.

Community safety

- Q. What is the expectation for bus/driver availability in the event of a school evacuation emergency?
- A. There is an evacuation plan for each school. Willard students to Sanborn, Peabody to Sanborn and vice versa, Thoreau to the Harvey Wheeler Center and the High School and Alcott to the Armory.
- Q. What is the expectation for bus/driver availability in the event of a town evacuation emergency?
- A. The transportation department Manager is on-call 24/7 for emergency evacuation. This includes assisting with prison and/or a hospital evacuation, as well as weather related emergencies for citizens. An example is when there was a fire on Elsinor (*sic*) Street some years ago and buses were brought in for residents to keep them warm if necessary. The transportation department Manager has a phone tree and can mobilize buses very quickly.
- Q. Is this different when school out of session?
- A. No, there is a summer emergency evacuation plan.

Routes

- Q. Describe the process of route design.
- A. Software by Transfinder is used for a basic model and then it is hand-tuned to adjust for local conditions.

- Q. What would cause a route to be changed during the year?
- A. New students could add to bus routes. Another example is the impact the Concord Mews will have on routes since elementary students from the Mews will be bused to Thoreau and Alcott. The middle school and high school runs will need to be extended to the Mews.
- Q. How much impact does safety have on route design?
- A. Safety is always a first priority. For example, Concord has many narrow roads without sidewalks. Rather than have students walk to aggregated stops, they are picked up at their driveways for safety reasons. While there are state guidelines based on distance from school that determines bus eligibility, Concord buses students within those distances if safety is a factor, i.e. crossing Route 2.
- Q. Clarify the district and state regulations for what students must be bused. How do we differ from these mandates?
- A. The state guidelines are 2 miles for high school students, 1.5 miles for grades 6-8, 1 mile for grades 3-5 and .5 miles for kindergarten. However Concord buses all kindergarten students.

Costs

- Q. Please help us understand how drivers are paid as there is a myth in the community that drivers are paid to sit around.
- A. Drivers are paid according to the steps in the contract ranging from \$18.34 to \$22.38 per hour. All regular drivers have a minimum guarantee of 25 hours paid, which makes them eligible for benefits and keeps us competitive in the market place. When we are fully staffed we have 29 route drivers and four 'spare' drivers, where spare means full-time drivers who provide coverage for absent drivers and/or trips. This helps both in terms of budgeting as it limits unforeseen expenses, and in assuring level of service. The easiest way to understand how drivers are paid is to use examples.

Example 1

Let's imagine a driver named Pat who is contracted for 27.5 hours a week. Pat is on the clock for routes from 6:15-9:15am and again from 1:45-4:15pm, for a total of 5.5 hours each day, or 27.5 hours per week. Pat will be paid an hourly rate based on contract terms and rates. Now, let's say that Pat is going to drive a mid-morning trip to a museum. This trip will be from 9:30-12:30, three hours. So on this day Pat will have worked 8.5 hours, 5.5 contracted hours and 3 additional hours for the trip. Pat's pay will be at the regular rate for the first eight hours and at the overtime rate for the additional .5 hour.

Example 2

Today Pat is going to drive a trip for one of the sports teams which will leave the high school at 2:15 and is not expected back until 7pm. Assume a 'spare' driver will cover

Pat's afternoon routes, which will not cost any additional money as that driver is on the clock already. As before, Pat is contracted for 5.5 hours, three in the morning and 2.5 in the afternoon. However, all drivers receive overtime for any driving after 4:15pm. In this case Pat would be paid at the regular rate for the three morning hours and for two hours in the afternoon, from 2:15-4:15. From 4:15 to 7pm Pat would be paid at the overtime rate. Drivers are also paid for a ½ hour meal period if they are working overtime between 5-8pm.

- Q. How often in a school year do we have to hire other bus companies to provide transportation? What are the major reasons for this?
- A. We hire out, typically Dee, approximately six times a year for drops (taking students to an event). This happens when our own buses are not available to drop students off. For example, this year because there were so many rain outs and make up sports events, eight on one day, three buses had to be hired for drops. Pick ups are scheduled for in-house service.
When we use Dee, we typically pay a flat fee of \$195 per drop.
- Q. What do we 'charge' for fuel, driver time, etc. for trips? How is this calculated? How is it accounted against overall transportation costs?
- A. We charge \$.55/mile for fuel and no additional cost for driver time is charged to the event. Comparable charge from private vendors is approximately \$2.50-3.00/mile plus \$15-20/hour for driver time with a minimum charge of 2-4 hours regardless of actual time.
- Q. How do you bill the recreation department? Does it cover the actual costs of the services provided?
- A. In the summer, the recreation department pays approximately \$40-42/hour for the driver, fuel and distance. This figure is calculated by the Transportation Manager.
During the school year, routes are planned to allow students participating in recreation department activities to be dropped off at the appropriate location with no additional costs.
It is worth noting that the recreation department has not raised fees in five years, being sensitive to economic conditions.
When they learned that the in-house transportation system might be replaced, the recreation department sought pricing from private vendors. They learned that the cost would increase by approximately \$20-24/hour.
- Q. Is transportation provided for summer school students? Is that a fee for service or absorbed in the budget?
- A. Concord does not provide transportation for local students for summer school. Metco students are provided with busing for four weeks of summer school. Two buses are used.

Appendix H: Software to extract accident codes

Appendix : Software used to extract causal codes from RMV accident data

The following perl script was used to process the RMV accident data, which is provided as a spread sheet file. This script assumes the separate fields of the spread sheet are comma separated (.csv). To prepare the spread sheet: first data within the spread sheet's cells is modified to eliminate any internal commas (in this case we substituted “;” for commas), then the data is exported from the spread sheet software in comma separated format.

The script purpose of the script is determine the causal categories associated with the driver(s) of any school bus(es) capable of carrying 15 or more passengers involved in any school bus accidents. It outputs a list of the causal categories it finds to a separate text file conveniently named “rmvAccidOut.csv”.

A sample of the output file of driver contributing codes associated with particular accidents is shown below. The field “Bus Id” indicates which of the vehicles identified in the accident V1,..., Vn is a bus of interest. The bus id is then used to access the contributing codes of a driver of the same number D1,...Dn.:

Crash Number	City Or Town	Year	Month	Day	Bus Id	Index	Driver Contributing Codes
2596666	AGAWAM	10	5	3	1	0	(No improper driving)
2655669	AGAWAM	10	10	18	2	0	(No improper driving)
2676345	AGAWAM	10	12	10	3	0	(Failure to keep in proper lane or running off road)
2608319	ANDOVER	10	6	9	1	0	(Other improper action)
2653615	ANDOVER	10	10	18	2	0	(No improper driving)

A listing of the perl extraction software that produces the above output follows:

```
#!/usr/bin/perl -w
# Copyright (c) 2012 by Mark Hanson, Concord, MA.
# All rights reserved.
#
# Permission to use, copy, modify, and distribute this software and
# its documentation in source and binary forms for non-commercial
# purposes and without fee is hereby granted, provided that the
# above copyright notice appear in all copies and that both the
# copyright notice and this permission notice appear in supporting
# documentation, and that any documentation, advertising materials,
# and other materials related to such distribution and use
# acknowledge that the software was developed by Mark Hanson.
#Documentation:
```



```

my $NumberOfFatalInjuries = $fields[7];
my $NumberOfVehicles = $fields[8];
my $MannerofCollision = $fields[9];
my $VehicleActionPriorToCrash = $fields[10];
my $VehicleTravelDirections = $fields[11];
my $FirstHarmfulEvent = $fields[12];
my $FirstHarmfulEventLocation = $fields[13];
my $MostHarmfulEvents = $fields[14];
my $VehicleSequenceofEvents = $fields[15];
my $VehicleConfiguration = $fields[16];
my $AgeofDriver_YoungestKnown = $fields[17];
my $AgeofDriver_OldestKnown = $fields[18];
my $DriverContributingCodes = $fields[19];

my $NonMotoristType = $fields[20];
my $NonMotoristAction = $fields[21];
my $NonMotoristLocation = $fields[22];
my $HitRun = $fields[23];
my $RoadSurface = $fields[24];
my $AmbientLight = $fields[25];
my $WeatherCondition = $fields[26];
my $StreetNumber = $fields[27];
my $Roadway = $fields[28];
my $DistanceAndDirectionFromIntersection = $fields[29];
my $NearIntersectionRoadway = $fields[30];

my $Landmark = $fields[31];
my $DistanceAndDirectionFromLandmark = $fields[32];
my $TrafficWay = $fields[33];
my $SpeedLimit = $fields[34];
my $RoadwayIntersectionType = $fields[35];
my $TrafficControlDeviceType = $fields[36];
my $TrafficDeviceFunctioning = $fields[37];
my $PoliceAgency = $fields[38];
my $SchoolbusRelated = $fields[39];
# @out = $VehicleConfiguration.$DriverContributingCodes;
# write OUT;

if ($VehicleConfiguration =~ /V\d:\WBus/) {
    print $VehicleConfiguration."\n";
#    print $DriverContributingCodes."\n";
    @fields = split (/:\\WBus/, $VehicleConfiguration); #*****there may be more than one
bus.
    my $busCount = @fields-1;
#    print "bus count = $busCount\n";
    for (my $i = 0 ; $i < $busCount; $i++) {

```

```

#           print "i=$i fields[$i] $fields[$i]\n"; #bus fields
           my $busNumber = chop $fields[$i]; #get a bus's number
           my @causes = split(/D$busNumber:/,$DriverContributingCodes); #need
"DbusNumber:" rather than busNumber
           my @driverCauses = split ( /[DP]\d:/, $causes[1]);
#           print "$i busNumber $busNumber => $causes[1].\n";
           print "$i busNumber $busNumber => $driverCauses[0]\n";
           my @driverCauseList = split (/^W;\W/, $driverCauses[0]);
           my $driverCauseCount = @driverCauseList;
#           print "count= $driverCauseCount. list = @driverCauseList\n";
           for (my $j=0; $j < $driverCauseCount; $j++) {
               if (($j == 0)&&($driverCauseCount!=1)) {$driverCauseList[$j] =
$driverCauseList[$j]."}";}
               if (($j>0)&&(($j+1) == $driverCauseCount)) {$driverCauseList[$j] =
"}".$driverCauseList[$j];}

#           {$driverCauseList[$j]=$driverCauseList[$j]."}";}
           print "$busNumber $j $driverCauseList[$j]\n";
           @out = $CrashNumber. ", ". $CityOrTown. ", ". $date[2] . ", ". $date[0] . ", ".
$date[1] . ", ".$busNumber. ", ". $j. ", ". $driverCauseList[$j];
           write OUT;
           }
       }
   }
}
next;
}
close STDIN;
close OUT;

```

Appendix I: Building CTC’s Inspection Spreadsheets

To facilitate compiling and processing the inspection statistics found in this report, data from over 1500 inspection sheets from Concord, Sudbury and Fitchburg shown in the picture below were extracted into spreadsheets for each municipality.



By extracting the data from these sheets into a spread sheet, we were able to quickly calculate the statistics shown in the report. We were also able to determine other useful information, like the average age of vehicles when inspected. One interesting study that has not yet been done is to determine the relative frequency of the different defect types versus town or provider.

A tiny sample of the data extracted from the sheets into a spread sheet is shown below. There is one row per sheet. Defect categories indicated on the sheet were extracted as the entries in columns 1 through n (below showing only the first two columns, many inspections uncovered more than two defects -- the record was nearly 10).

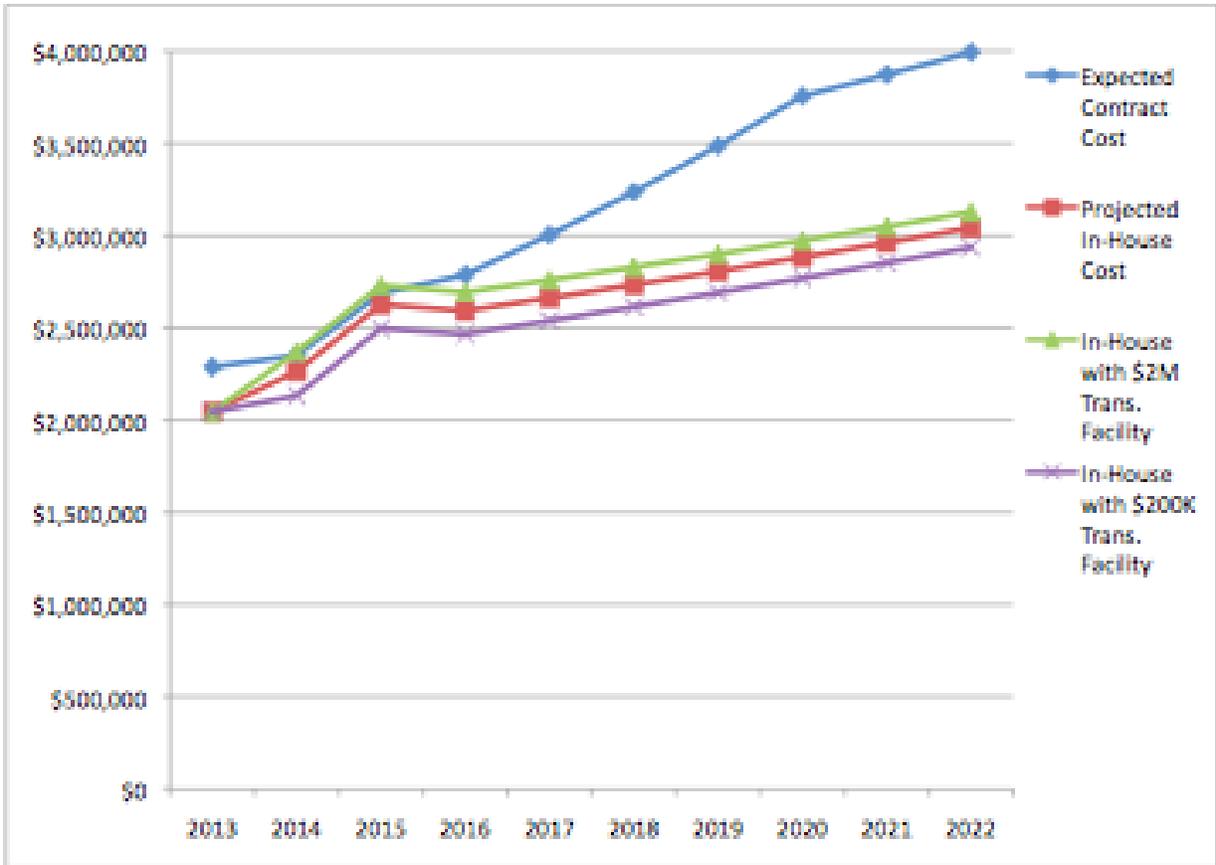
The “code” column indicates the severity of the defects. Defects of the eq and f type were repairable at the time of discovery. A failure of type oos (the last entry in this sample) caused the bus to be taken out of service.

yr	mo	vin	kmiles	code	1	2
8	12	561	64	eq	seats, restraining barriers	
8	12	562	72	eq3	seats, restraining barriers	
8	12	563	86	f3	hood, lock, battery	
8	12	564	59			
8	12	565	58			
8	12	566	80	f3	gauges	
8	12	566	80			
8	12	567	60			
8	12	568	65	oos3	steering	lights

Not shown in this table are codes in the spread sheet data that allow anyone to quickly locate the particular inspection sheet that the table entry reflects. This is useful to verify the accuracy of our findings.

Appendix J: Cost Comparison Data

	2013	2014	2015	2016	2017	2018	2019	2020	2021	2022	2023
Contract Pricing from April 2014	\$2,448,882	\$2,479,771	\$2,513,125	\$2,707,407	\$2,916,709	\$3,142,181	\$3,385,104	\$3,646,796	\$3,756,200	\$3,968,886	\$3,984,933
Inflation 3% + 4.75% per year											
Less Credit for sum of bus fare	-\$159,570	-\$159,570	-\$159,570	-\$159,570	-\$159,570	-\$159,570	-\$159,570	-\$159,570	-\$159,570	-\$159,570	-\$159,570
Registration buses (\$) in 2015, then 20%		\$102,907	\$207,618	\$207,618	\$207,618	\$207,618	\$207,618	\$207,618	\$207,618	\$207,618	\$207,618
Other vehicle maintenance	\$30,000	\$30,900	\$31,827	\$32,782	\$33,762	\$34,775	\$35,778	\$36,822	\$37,916	\$39,059	\$39,143
Total Expected Contract Cost	\$2,287,212	\$2,250,201	\$2,686,812	\$2,787,262	\$3,003,787	\$3,228,648	\$3,457,142	\$3,726,724	\$3,874,213	\$3,983,238	\$4,118,870
Projected In-house from budget	\$1,668,750										
Projected inflated 3% per year		\$1,724,804	\$1,782,508	\$2,042,077	\$2,103,340	\$2,166,442	\$2,231,423	\$2,298,576	\$2,367,327	\$2,438,347	\$2,511,497
Glennsburg Transportation Facility		\$109,000	\$156,100	\$151,200	\$147,300	\$140,400	\$139,500	\$135,000	\$131,700	\$127,800	\$123,900
Room expansion buses (\$) in 2015, then 20%		\$382,907	\$382,907	\$382,907	\$382,907	\$382,907	\$382,907	\$382,907	\$382,907	\$382,907	\$382,907
Benefits - Payments	\$70,000	\$72,130	\$74,294	\$76,520	\$78,818	\$81,183	\$83,618	\$86,127	\$88,711	\$91,372	\$94,113
Benefits - Health Benefits	\$105,043	\$108,194	\$111,440	\$114,780	\$118,227	\$121,774	\$125,427	\$129,180	\$133,035	\$137,007	\$141,109
Total Projected In-house Cost	\$2,243,842	\$2,264,178	\$2,625,796	\$2,662,201	\$2,681,291	\$2,733,028	\$2,828,848	\$2,882,968	\$2,967,490	\$3,082,483	\$3,126,024
Expected Contract Cost	\$2,287,212	\$2,250,201	\$2,686,812	\$2,787,262	\$3,003,787	\$3,228,648	\$3,457,142	\$3,726,724	\$3,874,213	\$3,983,238	\$4,118,870
Projected In-house Cost	\$2,243,842	\$2,264,178	\$2,625,796	\$2,662,201	\$2,681,291	\$2,733,028	\$2,828,848	\$2,882,968	\$2,967,490	\$3,082,483	\$3,126,024
In-house with \$2M Transit Facility	\$2,243,842	\$2,270,178	\$2,729,196	\$2,693,001	\$2,758,721	\$2,828,628	\$2,899,648	\$2,973,268	\$3,049,290	\$3,127,883	\$3,208,624
In-house with \$200K Transit Facility	\$2,243,842	\$2,131,678	\$2,496,540	\$2,466,201	\$2,508,781	\$2,613,528	\$2,680,598	\$2,759,908	\$2,851,740	\$2,965,989	\$3,082,774



Appendix L: CTC Charge

Citizen School Transportation Committee

Established by the Concord Special Town Meeting on April 24, 2012

MISSION

Town Meeting, in creating this Committee, expressed an intent "to search diligently for ways to maintain the existing Bus Transportation Department."

RESPONSIBILITY

The Committee will be asked to examine a number of issues, including but not necessarily limited to the following. After a complete review of these issues, the Committee is asked to present its report by July 17, 2012 to the Concord Public Schools Committee and the Concord-Carlisle Regional School Committee, summarizing their findings and providing recommendations.

- Consider safety issues.
- Prepare a detailed analysis comparing costs associated with an in-house bus service with an outsourced one.
- Consider the value of such intangibles as (a) widespread community trust in present system; (b) confidence in local administrators, bus drivers and mechanics who know the Town well and can respond quickly in unusual circumstances.
- Identify potential sites on School-owned property, Town-owned property, or privately owned property within Concord or contiguous towns where the bus transportation activities might be relocated, and estimate the cost.
- Hold at least one public hearing to solicit comments from the public and confer with School officials.
- Write a Report with recommendations to the Concord Public Schools Committee and the Concord-Carlisle Regional School Committee.

SUGGESTED TIMETABLE

July 2, 2012 Issue draft report/ recommendations for public review

July 9, 2012 Hold a public hearing on recommendations

July 17, 2012 Present report to CPS and CCRHS Committees

MEMBERSHIP REQUIREMENTS AND EXPECTATIONS

Members will be appointed (four by the Moderator and three by the Concord-Carlisle Regional School Committee) for a term of three months to expire on July 31, 2012. The Committee should complete its business by July 31, 2012, subject to extension at the discretion of the appointing authorities.

OTHER CONSIDERATIONS

The Committee shall elect a chair and a committee clerk, who will be responsible for maintaining the record of the committee's discussions, votes, and actions.

All meetings will be conducted in conformance with the Open Meeting Law, including the proper notice and posting of meetings, and all records will be maintained in conformance with the Public Records Law.

Public discussion is expected to take place before recommendations are presented to the Concord Public Schools Committee and the Concord-Carlisle Regional School Committee.

Requests for staff assistance or operating expenses will be made in compliance with the following regulations:

KDB PUBLIC'S RIGHT TO KNOW

http://policy.ctspublish.com/concord-carlisle-masc/lpext.dll/Infobase/heading%20200289.htm/heading%20300300.htm?f=templates&fn=document-frame.htm&2.0#JD_KDB

KLK RELATIONS WITH LOCAL GOVERNMENTAL AUTHORITIES

http://policy.ctspublish.com/concord-carlisle-masc/lpext.dll/Infobase/heading%20200289.htm/heading%20300315.htm?f=templates&fn=document-frame.htm&2.0#JD_KLK

Town of Concord, APP # 6, Staff Communications with Boards

http://www.concordma.gov/pages/ConcordMA_TownManager/policies/APP6_Staff%20Communications%20with%20Boards.pdf

Appendix M: 2011-2012 Bus Runs

CPS and CCRSD Buses and Runs per day - based on posted bus route schedules

district	VEH#	Morning Runs			K runs	Afternoon Runs			Late Runs	
		CCHS	CMS/ PRIVATE	ELEMENTA RY	K - all	CCHS	CMS	ELEMENTA RY	PRIVATE/ LATE	LATE
CPS 2010	1	SPARE								
CPS 2006	2		cms 7:25-8:00	alcott 8:08-8:45			cms 2:30-3:10	alcott 3:25-3:58	nash/fen 3:53-4:46	
CC 2006	3	SPARE								
CC 2006	4	SPARE								
CPS 2006	5	cchs 6:38-7:12	cms 7:19-8:00	thoreau 8:05-8:45		cchs 2:17-2:47		thoreau 3:25-4:07		
CPS 2007	6		cms 7:07-8:00		nash/fen 12:20-1:17		cms 2:30-3:25		nash/fen 3:45-4:34	
CPS 2011	7	cchs 6:19-7:10	nash/fen 7:14-7:59	thoreau 8:04-8:49	thoreau k 12:00-1:09	carl cchs 2:17-3:22		thoreau 3:25-4:23		
CPS 2010	8	cchs metco 5:15-7:20	nash/fen 7:26-8:08		thoreau k 12:00-12:50		cms 2:30-3:02	willard 3:25-4:02	cchs/cmsm etco 4:10/4:30-	
CPS 2010	9	elem metco 6:15-8:30					cms 2:35-3:07	elem metco 4:10		
CC 2006	10	carl cchs 6:15-7:12	nash/fen 7:11-8:00	willard 8:05-8:47	alcott k 12:00-12:51	carl cchs 2:17-3:14		willard 3:25-4:07		
CPS 2006	12	cchs 6:50-7:12	cms 7:13-8:00	willard 8:02-8:47		cchs 2:17-2:49	cms 2:30-3:50		cms late 3:45-	
CC2006	14	carl cchs 6:14-7:11	nash/fen 7:20-7:57	thoreau 8:12-8:47	thoreau k 12:00-12:57	carl cchs 2:17-3:21		thoreau 3:25-4:04		
CC 2006	16	cchs 6:48-7:10	cms 7:18-8:00	thoreau 8:19-8:41		cchs 2:17-2:42	cms 2:30-3:14	thoreau 3:25-3:59		
CPS 2012	17	cchs 6:42-7:10	cms 7:24-8:00	alcott 8:14-8:46		cchs 2:17-2:42	cms 2:30-3:14	alcott 3:25-4:05		
CC 2012	18	cchs 6:32-7:04	cms 7:27-8:00	alcott 8:00-8:39		cchs 2:17-2:52	cms 2:30-3:11	alcott 3:25-3:59		
CPS 2003	19	SPARE								
CPS 2006	20	cchs metco 5:15-7:20	nash/fen 7:30-8:00	willard 8:08-8:47	nash/fen 12:20-1:03	cchs metco 2:20-				
CPS 2009	21	cchs 6:22-7:11	nash/fen 7:19-7:58	willard 8:16-8:45	thoreau k 12:00-12:57	carl cchs 2:17-3:05		willard 3:25-4:02	cms late 4:30	cchs late 5:15
CPS 2011	22	carl cchs 6:14-7:09	nash/fen 7:19-8:05	thoreau 8:00-8:52	alcott k 12:00-1:09	carl cchs 2:17-3:15		thoreau 3:25-4:18		
CC 2006	23	cchs 6:14-7:13	cms 7:20-8:00	alcott 8:01-8:46		cchs 2:17-2:46	cms 2:30-3:14	alcott 3:25-4:04		
CPS 2010	24	cchs 6:48-7:10	cms 7:13-8:00	alcott 8:01-8:47	willard k 12:00-1:04	cchs 2:17-2:46	cms 2:35-3:15	alcott 3:25-3:55	nash/fen 3:52-4:55	
CC 2009	25	carl cchs 6:15-7:12	nash/fen 7:30-8:01	willard 8:18-8:47	alcott k 12:00-1:04	cchs 2:17-3:10		willard 3:25-4:11		
CPS 2006	26		cms 7:26-8:00	willard 8:14-8:48			cms 2:30-3:05	willard 3:25-3:55	nash/fen 3:53-4:37	

CPS and CCRSD Buses and Runs per day - based on posted bus route schedules

district	VEH#	Morning Runs			K runs	Afternoon Runs			Late Runs	
		CCHS	CMS/ PRIVATE	ELEMENTA RY	K - all	CCHS	CMS	ELEMENTA RY	PRIVATE/ LATE	LATE
CC 2000	27				nash/fen 12:00-1:04					
CPS 2006	28	cchs 6:37- 7:15	cms 7:17- 8:03	willard 8:08-8:46		cchs 2:17- 3:00		willard 3:25-4:03	nash/fen 3:53-4:38	carl cchs late 5:15
CC 2010	29	elem metco 6:15- 8:30				cchs 2:17- 2:41		elem metco 4:10		
CPS 2007	30	metco cms 5:15- 8:00			nash/fen 12:10-1:12		metco cms3:20-			
CC 2003	31	SPARE								
CC 2008	32	cchs 6:25- 7:12	cms 7:30- 8:00	thoreau 8:05-8:47		cchs 2:17- 2:55	cms 2:30- 3:05	willard 3:25-3:57	nash/fen 3:54-4:26	
CC 2008	33	cchs 6:38- 7:10	cms 7:27- 8:00	willard 8:21-8:47	willard k 12:00- 12:54	cchs 2:17- 2:37	cms 2:30- 3:09	willard 3:25-4:05		
CC 2008	34	cchs 6:29- 7:10	cms 7:24- 8:02	alcott 8:10- 8:45		cchs 2:17- 2:45	cms 2:37- 3:07	alcott 3:25- 3:54	nash/fen 3:49-4:47	
CPS 2008	35	cchs 6:29- 7:10	cms 7:25- 8:00	thoreau 8:06-8:46	willard k 12:00- 12:52	cchs 2:17- 2:52	cms 2:30- 3:07	thoreau 3:25-4:11		
CPS 2008	36	cchs 6:38- 7:10		willard 8:20-8:47		cchs 2:17- 2:42	cms 2:30- 3:08	willard 3:25-4:14		
CPS 2007	60	cchs 6:49- 7:10	cms 7:20- 7:57			cchs 2:17- 2:43	cms 2:30- 3:50		cms late 3:45-	
CPS 2007	61	cchs 6:19- 7:10	cms 7:24- 8:01	alcott 8:01- 8:44	willard k 12:00- 12:57	cchs 2:17- 2:41	cms 2:30- 3:21	alcott 3:25- 4:06		
CPS 2007	62								cms late 4:30	cchs late 5:15

Notes:

27 is a van sized bus

19 and 32 are wheelchair accessible buses

region owns 14 buses

CPS owns 22 buses

Appendix N: 2012-2013 Bus Runs

CPS and CCRSD Buses and Runs per day - based on posted bus route schedules 2012

district	VEH#	Morning Runs			K runs	Afternoon Runs			Late Runs	
		CCHS	CMS/ PRIVATE	ELEMENTA RY	K - all	CCHS	CMS	ELEMENTA RY	PRIVATE/ LATE	LATE
CPS 2010	1	spare								
CPS 2006	2	cchs 6:32-7:04	cms 7:16-8:00	willard 8:11-8:47	thoreau 12:25-1:01	cchs 2:17-2:57		willard 3:25-4:02		
CC 2006	3		cms 7:10-8:00	thoreau 8:15-8:45	nash tue 12:20-1:20	cchs 2:17-2:41	cms 2:30-3:25		3:35-4:55	
CC 2006	4	cchs 6:32-7:10	cms 7:29-8:00	alcott 8:11-8:45		cchs 2:17-2:50	cms 2:30-3:13	alcott 3:25-3:59		
CPS 2006	5	carl cchs 6:19-7:06	nash/fenn 7:14-7:57	thoreau 8:04-8:46	alcott 12:15-1:02	carl cchs 2:17-3:27		thoreau 3:25-4:24		
CPS 2007	6		cms 7:26-8:00	willard 8:14-8:48			cms 2:30-3:07	willard 3:25-3:54	3:49-4:45	
CPS 2011	7		cms 7:28-8:00	alcott 7:59-8:45			cms 2:30-3:13	alcott 3:25-3:59	3:53-4:53	
CPS 2010	8	metco 5:15-7:20	nash/fenn 7:26-8:07		alcott 12:10-12:54	metco 2:20-4:40	cms 2:30-3:02	willard 3:25-4:06		
CPS 2010	9			metco 5:15-7:35		cchs 2:17-2:49		metco 4:20		
CC 2006	10	carl cchs 6:22-7:11	nash/fenn 7:19-7:59	willard 8:16-8:47	thoreau 12:00-1:00	carl cchs 2:17-3:02		willard 3:25-4:01		cms 4:30 cchs 5:15
CPS 2006	12	cchs 6:45-7:12	cms 7:12-8:00	willard 8:02-9:00		cchs 2:17-2:48	cms 2:30-3:47			cms 3:45
CC2006	14	carl cchs 6:14-7:11	nash/fenn 7:25-8:07	thoreau 8:12-8:46		carl cchs 2:17-3:18		thoreau 3:25-4:05		
CC 2006	16		metco 5:15-7:10		nash tue 12:20-1:20		metco 4:05			
CPS 2012	17	cchs 6:49-7:05	cms 7:18-8:00	alcott 8:30-8:41	nash tue 12:20-1:05	cchs 2:17-2:43	cms 2:30-3:48			cms 3:45
CC 2012	18				willard 12:00-12:55					
CPS 2003	19	spare								
CPS 2006	20	metco 5:15-7:20		willard 8:08-8:47		metco 2:20-4:40	cms 2:30-3:02	willard 3:25-4:06		
CPS 2009	21	spare								
CPS 2011	22	carl cchs 6:14-7:11	nash/fenn 7:19-7:58	thoreau 8:03-8:47	alcott 12:10-12:44	carl cchs 2:17-3:14		thoreau 3:25-4:19		
CC 2006	23	cchs 6:33-7:10	cms 7:18-8:00	alcott 8:00-8:46		cchs 2:17-2:46	cms 2:30-3:19	alcott 3:25-4:05		
CPS 2010	24	cchs 6:38-7:10	cms 7:32-8:00	willard 8:21-8:47		cchs 2:17-2:47	cms 2:30-3:08	willard 3:25-4:02		
CC 2009	25	carl cchs 6:15-7:07	nash/fenn 7:15-8:14	willard 8:14-8:45	alcott 12:10-12:53	carl cchs 2:17-3:20		willard 3:25-4:14		
CPS 2006	26	cchs 6:38-7:12	cms 7:19-8:00	thoreau 8:06-8:45		cchs 2:17-2:47	cms 2:30-3:07	thoreau 3:25-4:04		

CC 2000	27				nash th-fr 11:45-1:07					
CPS 2006	28	carl cchs 6:10-7:08	nash/fenn 7:10-8:00	willard 8:05- 8:47	thoreau 12:00-1:02	carl cchs 2:17-3:13		willard 3:25- 4:08		cms 4:30/cchs 5:15
CC 2010	29					cchs 2:17- 2:36		metco 4:30		
CPS 2007	30	cchs 6:42- 7:10	cms 7:24- 8:00	alcott 8:05- 8:45		cchs 2:17- 2:50	cms 2:30- 3:13	alcott 3:25- 4:00		
CC 2003	31	cchs 6:37- 7:10	cms 7:11- 8:00	alcott 8:05- 8:46			cms 2:30- 3:22	alcott 3:25- 4:00	3:52-4:50	
CC 2008	32	cchs 6:50- 7:10	cms 7:26- 8:00	thoreau 8:03-8:45		cchs 2:17- 2:43	cms 2:30- 3:08	alcott 3:25- 3:57		
CC 2008	33	cchs 6:24- 7:10	cms 7:30- 8:00	willard 8:21- 8:47	willard 12:00- 12:55	cchs 2:17- 2:40	cms 2:30- 3:10	willard 3:25- 4:08		
CC 2008	34	cchs 6:29- 7:10	cms 7:15- 8:00	thoreau 8:15-8:45	willard 12:00- 12:58	cchs 2:17- 2:47	cms 2:30- 3:13	thoreau 3:25-4:09		
CPS 2008	35	cchs 6:43- 7:11	cms 7:21- 8:00	alcott 8:10- 8:45		cchs 2:17- 2:41	cms 2:30- 3:14	alcott 3:25- 3:48	3:53-4:47	carlisle 5:15
CPS 2008	36				thoreau 12:25-1:00					metco 6pm
CPS 2007	60	cchs 6:51- 7:10	cms 7:25- 8:00	thoreau 8:190-8:44			cms 2:30- 3:12	thoreau 3:25-4:08		
CPS 2007	61	cchs 6:30- 7:10	cms 7:18- 8:00	alcott 8:12- 8:45	willard 12:00-1:00	cchs 2:17- 2:47	cms 2:30- 3:16	alcott 3:25- 3:57		
CPS 2007	62	spare								

Notes:

27 is a van sized bus

19 and 32 are wheelchair accessible buses

region owns 14 buses

CPS owns 22 buses

Disclaimer: This information is based on the routes published on the school website as of 9/2012

Appendix O: Cost Questions from the Public Hearing

Cost Factors

1. Where is the landfill site? Is it behind goose pond?

Yes

Which site would require the least permitting?

2. They will all require some level of permitting. The Ripley/Ammendolia land and the Light Plant would require wetlands permits.
3. Of the three sites, which would be least expensive?

The least expensive option is keeping the transportation facility exactly where it is. Next would be moving part of it such as bus parking to another location on High School premises such as the existing student parking lot. Next would be moving the entire facility on site. Next would be moving buildings or rebuilding on Town or School land and rebuilding the rest of the infrastructure. Next would be rebuilding everything on private land.

4. Is there a cost to keeping the facility where it is now?

The cost would be minor modifications to the “ring road” around the new high school, along with re-grading. According to a landscape architect who looked at the site, the re-grading and landscape changes would cost less than \$200,000.

5. Where would the fuel depot be on the high school site?

We would prefer to keep it right where it is. Another alternative (instead of creating a new one) is joint use of a Town fuel depot. This could entail upgrade to an existing depot, installing devices on all the vehicles to measure fuel use, coming up with a non-interfering schedule – for example buses refuel once a week out of school hours, so early morning should work fine.

6. What’s the timing for use of the student parking lot?

The state first needs to decide what the problems are, and how to remediate. There is not a schedule for this yet that we know of.

7. Are you under pressure to finish the parking lot within three years?

A long-term solution for bus parking is important because of the cost of leasing temporary space but also the cost in fuel, driver time, and wear and tear on the buses. We would like to see a permanent solution in town this year.

8. Has there been any discussion about facility one place, buses another?

This is one of the alternatives that has been looked at, but there are many advantages to having everything co-located. This includes administration offices, maintenance building, fuel depot, bus parking, and driver parking.

9. If we rebuild a single building for the buses, will it be a safety hazard for the drivers and mechanics with the gasoline fumes?

This should not be a problem with adequate ventilation etc. It is a matter of design.

10. Is the CTC looking at short term or long term solutions?

We are concentrating on long-term solutions although short-term needs inevitably arise.

11. What is the cost difference with keeping the bus system the way it is, tweaking it slightly, and adding another site to keep buses?

The options for the Transportation Facility are covered in the report. Also see the answer to question 3 above.

12. How much would we save by either leaving it the way it is, or adding another bus lot to keep the buses?

The savings could be up to \$2,000,000; leaving it the way it is, is the least cost option.

13. Will you be able to put out all the costs for the public to see?

The project costs over a 10 year period of outsourcing versus in-house operation will be published in the final report.

14. Why are your numbers and the district numbers different?

This is covered in detail in our final report.

15. Have you included the costs of maintaining the school/town vehicles?

We have attempted to do that, and added it into the cost projection for outsourcing.

16. Can you put a cost on the use of the buses not only to bus students but for emergencies in the town?

This is very hard to put a cost on because it happens infrequently. However this is an area that should have been covered in the request for bids.

17. Have you been able to keep all things equal?

We've tried to in our final report.

18. What's the best way to provide the service?

Maintain the existing service in house, in one location in town, preferably on the existing site.

19. Does it make sense to out-source our private school transportation?

This is something that should be looked at and is identified in our final report.

20. Could you get the data for outsourcing in elementary schools in Carlisle for the past 10 years?

We can try to do this, but it isn't a priority at this time.

21. Are there dedicated buses for Carlisle routes?

No

22. When did the schools last buy buses? Is the money budgeted still available to buy buses?

The last bus was bought in 2010. 2 buses were budgeted in 2011 and 2012 but not spent. The money is no longer available because buses are expensed in the year they are purchased.

23. Were the buses going to be leased to First Student?

In the first bid (Nov 2011) they were to be leased. In the April 2012 bid the buses were going to be sold in a separate bid.

Appendix P: Safety Questions from the Public Hearing

Training (slide 3)

1. Who does the training for the bus drivers?
Certified driver/trainers and specialists (bullying, railroad safety, etc.)
2. Is the cost for the training built in?
Yes, but drivers are not paid for time spend in training.
3. Is there a penalty for not being trained?
Loss of bus driver's license, which requires 8 hours/year of training.

Inspections (slide 4)

4. What is the frequency of the inspections? Will the inspection sheets be checked periodically?
3 times a year Fall(Aug-Oct), winter (Dec-Jan), spring (April-May)
5. Are the inspections scheduled? Is there prior notice?
6. Are the bus check sheets required for inspection?
yes
7. Who's enforcing the law saying the inspection sheet is required?
Mass RMV.
8. Does management of the RMV periodically check the inspection sheets?
Inspectors are employed by the RMV. This is a good question. Will ask the RMV.
9. Are the standards of road maintenance different between towns, and does that have an effect on the buses and their inspectors?
Roads are different, effect on buses is mostly to chassis portion of inspection (about 10% of items).
10. Did you factor in the age of the bus?
No, we only have the odometer readings. Our buses are probably older because our buses go fewer miles per year. Why fewer miles? Because our transportation depot at the high school minimizes non-route miles driven (for example if we move our bus parking area from the high school to Acton we increase our annual mileage for the fleet of 36 buses from 300,000 to roughly 440,000 miles. We also don't do weekend charters, which saves miles.

11. Do we have a good idea of where the 100,000 mile limit came from?

Limit is more based on the condition of the bus.

Facility safety

12. If we rebuild a single building for the buses, will it be a safety hazard for the drivers and mechanics with the gasoline fumes?

No because vehicle maintenance buildings have proper ventilation. Not any worse than a car dealership.

Accidents (slide 5)

13. Did Lexington outsource?

Yes (C&W)

14. Should we be out-performing the state average?

For accidents, it's unlikely because of traffic and road conditions are a factor. Most accidents not fault of bus driver.

15. Do we know if there's any RMV bias as to how they collect their information?

The information is collected by police departments, not the RMV.

16. Do we know the total number of trip miles?

Roughly. Concord buses travel about 8,333 miles per year on average. First Student's average is 14,006. It is a multinational company and this mileage includes non-school charters.

Accident Statistics (slides 6 and 7)

17. Are page 10 table statistics even significant?

Yes.

18. Concord's school administration published accident-per-mile statistics showing Concord's buses got in accident far more often than Outsourcing companies. For example, the table showed First Student's buses (the provider for Sudbury and Lincoln) went 13 time further and between accidents.

The page 10 table is normalized to the accident. It shows that our drivers do not cause accidents 13 times more often than First Student's drivers in Sudbury or Lincoln.

However, because the sample sizes are small one should not use this table to state, for example, that Concord's drivers cause fewer accidents than Bedford's. The statistical margin of error is too large. For example, political polling is also randomly done and it

takes 1300 or so events (call to a citizen and getting answers) to give estimates that have an error of $\pm 5\%$.

Driver Turnover (slide 8)

19. Do we know if we have a contractor, do we get the same drivers?

NO

Level of service (slide 9)

20. How long are routes in each town?

Depends. Typically about 1/2 hour max in Concord. In Framingham it's more like 1 hour.

21. Does anybody charge a penalty/fee for not taking the bus?

No. Students who drive pay for parking at CCHS.

22. How does RMV plan the routes?

Local school transportation planners and/or contractors plan the routes.

Appendix Q: Estimate sources

For a new, single structure to replace the existing maintenance building and the modular building, estimates were received from:

- Space Buildings (East Taunton, MA)
- DR Poulin (Fitchburg, MA)
- Rhino Building (Denton, Texas)
- Olympia Buildings (McKees Rocks, PA)
- Morton Buildings (Auburn, NH)

These estimates ranged from \$480,000-\$600,000, and cover the entire building, start to finish (foundation through building completion), but not any site preparation or hook-ups.

Paving estimates, for a 2 acre lot, were received from:

- Shoemaker & Jennings/Nashoba Paving (Concord)
- Lazaro Paving (Shirley)
- Johnston Paving (Sudbury)

These estimates ranged from \$185,000-\$250,000, and covered grading and paving only.

TRANSPORTATION ADVISORY COMMITTEE (TAC) REPORT

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I. EXECUTIVE SUMMARY

On 6.19.12 the School Committees approved the Transportation Advisory Committee (TAC) charge. The TAC was charged with creation of a comprehensive compilation of information and making a presentation to the School Committees at the October 23, 2012 Joint School Committee meeting. (see attachment 1 TAC Charge)

Tasks of the TAC include the following:

- Transportation Facility Site Selection
- Develop a series of options that allow the School Committees to assess comparative costs and benefits between owner-operated student transportation services and contracted student transportation services.
- Develop timelines for land acquisition, financing, construction, and other anticipated aspects of the development of an owner-operated student transportation facility.
- Develop accurate estimates for the cost of land acquisition, construction, permitting fees, bus fleet acquisition, maintenance expenses, personnel expenses, and other anticipated expenses associated with owner-operated student transportation services and facilities.
- Investigate sources of funding other than the CPS and CCRSD operating budgets for both the development of the transportation facility and the ongoing capital and other associated expenses for owner-operated student transportation services.
- Review safety standards for student transportation, including driver training, driver certification, and incident reports, where it does not violate employee confidentiality
- Consider scenarios for providing transportation for Concord Public Schools and the Concord-Carlisle Regional School District together and providing transportation for the Concord Public Schools and the Concord-Carlisle Regional School District separately. Special consideration should be given to outsourcing transportation at CCRSD only.

Using the Solar Citing Committee report as a model, the TAC developed a matrix for considering properties for possible use as a transportation depot. In our review we started with the assumption that the property would need to be approximately 2 acres. Members of the TAC then worked to identify potential properties in Concord, Acton, and Maynard. We looked at school and town owned properties, as well as privately owned properties. We considered property size, zoning, environmental issues such as water conservancy, set-backs to rivers and streams, neighborhood, current land use, cost, and traffic flow. Following our research, we ranked properties on a scale of 1-5 with "1" being properties of most interest to the committee and "5" indicating that the committee eliminated the property. We have considered approximately 20 properties thus far.

Members of the committee conducted meetings with various Town of Concord departments and staff. On several occasions we discussed the potential for shared use of facilities between the schools and the Town with a goal of planning for sustainable, safe, cost effective options.

The committee endeavored to create a report as factually correct and as clear as possible at the time of printing.

TAC Members/Relevant Experience

Maureen Spada	Chair, Concord Public School Committee, parent of CMS and CCHS students
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Phil Benincasa	School Committee Member, former Board Of Selectmen, grandparent of CPS students
John Flaherty	Deputy Superintendent of Finance and Operations, Oversees Transportation Department
Chris Sgarzi	Architect, School Building Committee for Alcott and Thoreau, Master Plan Committee, Current member of the Planning Board and the Community Preservation Committee (CPC), parent of CMS and CCHS student
Janet Friedman	Certified Financial Planner®, Current CCHS Parents Association Vice President, Former Finance Committee member, parent of CCHS student and recent CCHS graduate. Taking the lead on the financial analysis report to the School Committee
Lisa Bergen	Chair, Citizens Transportation Committee, parent of CCHS student.
Chris Popov	Attorney and Administrative Law Judge – State of MA. Dept. of Public Safety, Youth Coach softball, basketball, baseball, parent of Middlesex and Sanborn Students. Taking the lead on the safety analysis report to the School Committee.

II. SAFETY AND LEVEL OF SERVICE

Summary

No studies were found that discuss how owner-operated (“public”) and vendor-contracted/out-sourced (“private”) operations address safety issues. None of the contacted professionals have found any research studies that focus on differentiating between public and private operations with respect to safety. None of the professionals would assert that there are *inherent* safety advantages or disadvantages in either type.

All systems, public or private, must meet state and federal laws and regulations. It has been found that both types of operations generally meet the legally required minimums with respect to safety.

A school district’s oversight of its bus transportation system is key. The contractual provisions that govern management, in either public or private systems, determine whether the levels and types of services are believed to address any concern that may implicate safety. Regardless of the type of system, the safety assurances one should reasonably expect should be the same in any type of school bus transportation system.

Safety Goals/Hypotheses

One possible recommendation is that the School Committee and Administration fully identify all deficiencies that affect level-of-service-safety concerns in the present operation. Is this the best we can do, or can the level-of-service be improved, and at what cost, through a public or a private operation (or variation of those)? Is this a reasonable model to continue in a public or private operation?

If we plan to: retain ownership of the buses; operate the same routes and stops; require/allow only the same present uses of the bus fleet; and require the same levels of maintenance, then most of the safety-related concerns could be addressed.

Issues/Safety-Related Concerns

There are many aspects that relate to safety. Bus maintenance and the number/types of accidents may be among the easiest to identify, although agreeing on how to evaluate the number of bus defects or types of accidents is more difficult. Accidents, at least those for which the driver was “responsible,” also relate to driver performance.

Performance includes (among other issues): route knowledge, stops, loading/unloading, on-bus management, communication, training, and emergency procedures (including traffic/railroad crossings and evacuations). Numbers of routes, lengths, stops, and stop locations also implicate safety. Security of buses and depot safety are also part of ensuring that buses are safe to operate/safely operated.

While there are performance minimums needed to meet regulatory safety requirements, there are levels of service that include those minimums, but may also provide service “over and above” those requirements. For example, the number of stops in a given neighborhood may provide service convenience. But at what number does safety appreciably change for the better or worse?

A national study, “Special Safety Concerns of the School Bus Industry,” reported that its survey respondents believe that main barriers to improved safety consist of inadequate funding; lack of law enforcement and public awareness of laws; and insufficient support from administrators and parents to improve safety and intervene with problem behavior. (*CTBSSP Synthesis 17, Special Safety Concerns of the School Bus Industry, a Synthesis of Safety Practice*,” Transportation Research Board of the National Academies, sponsored by the Federal Motor Carrier Safety Administration (2010), p. 20). (The study also noted, however, that one of its major limitations in its research was the relatively low response, 198 responses from around the country.)

Discussion

Regarding safety, there are not inherent advantages or disadvantages between public and private systems. There are “floors” of legally mandated safety measures. (See. e.g. in Massachusetts G. L. c. 90; 540 CMR 8.00; 540 CMR 21.00). “Private school bus contractors are subject to many federal safety regulations (*Federal Motor Carrier Safety Regulations n.d. FMCSR*) and all state regulations. School districts that operate their own fleet of buses are subject to limited federal regulations and any applicable state regulations regarding operation. Throughout the literature review, regulatory compliance of school bus operations is not a recurring theme.” (*CTBSSP Synthesis 17*, p. 7).

Professionals in the field generally agree that there are not systematic safety differences between public and private operations. Regulatory compliance is usually achieved in any type of system. The quality of management is the key to service performance that might implicate safety concerns. School districts must retain responsibility for overall control. Districts cannot decide that they are “out of the transportation business” when they out-source bus operations.

In addition to having a transportation coordinator and central staff, could a transportation safety committee (TSC) help improve level-of-service/safety concerns? (According to its web site Bedford School District, has a TSC made up of: the Director of Finance; School Committee Representative; Principals; Bedford Charter Representative; Parent Representative; and Town Safety Officer - Police Dept.). But, according to the Bedford School business office (telephone call on 9/27/12), the TSC has “boiled down” to the

Director of Finance, who consults with others, meets with the bus company, and makes decisions. The TSC has not been regularly meeting.

Equipment

The CTC review concluded that the School District's buses have a significantly better inspection and defect record than the buses First Student operates in Fitchburg and Sudbury. Does the Registry of Motor Vehicles (RMV) have readily accessible data that shows how the District's 13% failed rate compares with Commonwealth's overall averages? What is First Student's Failure/Defect rate in all of the Commonwealth communities in which it operates? What are the Failure/Defect rates for a larger sample of private bus operations? To the extent the District considers any vendor, it would be reasonable for the vendor to supply its RMV inspection data.

Would Failure/Defect rate for vendors who own and operate buses be different from the rate for vendors who operate fleets owned by school systems? Can the maintenance requirements in a vendor contract be structured to achieve at least the District's maintenance record?

Age of the buses should be considered. Is the District's fleet generally older or younger than other fleets? If it's older and better maintained than younger fleets, then the District's present maintenance staff may have more reliable maintenance skills than their counterparts.

CTC concludes that the District's buses are in good shape because each bus driver is assigned to a particular bus, so the driver is invested in the condition of the bus and the driver has better knowledge to give better information to the mechanics. Do any vendors also follow the same bus/driver assignment policy?

Ensuring that buses are clean for school use is a concern. The argument is that First Student, and presumably other vendors, want to use their fleets on weekends as part of their business model. In our present operation we do not allow buses for non-school related weekend functions. As long as the District retains ownership of its fleet, can non-District use (in support of a vendor's non-District business) be restricted by contract? Even if we assume that a private vendor such as First Student does not maintain buses as well as Concord does, would the retaining of fleet ownership and applicable contract requirements ensure our customary maintenance standards? For example, would a vendor contract require allowing the vendor use of the District's buses during off hours (or is it reasonable to negotiate a restriction)?

Accidents

The accident analysis CTC provided and the analysis the District provided do not support concluding that one system performs (i.e. avoids accidents) significantly more or less favorably than another. The CTC data shows that 27.5% (1187/4311) of the coded incidents from the state-wide RMV database were possibly contributed by bus drivers. But the sampling of accidents among nearby towns is limited because school bus accidents are infrequent. (The State total on page 10 of the CTC presentation dated September 19th, 2012, has 24%, while Concord is 31%. Lincoln and Carlisle are 50%; Sudbury 21%; Bedford 56%; Lexington 47%. Thus, a relatively small change in the actual number of accidents "possibly contributed by" the driver could make the performance of a town such as Sudbury appear to be significantly better than Concord, while Bedford could appear significantly worse).

CTC concluded that "Concord's drivers have an accident record that is about the same as drivers in neighboring towns, given the limited sample."

To the extent more analysis could be helpful, it might make sense to review more RMV data in one group, as CTC suggested, and, possibly, compare insurance claims in another group. Also, a review of "accidents" could control for the FMCSA definition of "accident", which means an occurrence resulting in: a

fatality; bodily injury which results in medical treatment away from the scene of the accident; or one or more vehicles incurring disabling damage requiring motor vehicle(s) to be transported away from the scene by tow truck or other vehicle. “Accident” for FMCSA reporting does not include boarding/alighting from a stationary vehicle or loading/unloading cargo. *49 CFR Section 390.5*. Do we report to our insurers and RMV “accidents” which do not meet the federal definition, i.e. do we have a larger number of accidents?

With respect to vendors, do their insurers’ records include/exclude “accidents” different from what appears in the federal data? Do insurers have more precise records about what accidents the insurers believe were caused by drivers? (Could insurance accident records be part of any contract review?).

According to the Division of Insurance and United States Adjusters, insurers analyze claims and make determinations about bus drivers’ responsibility for accidents as part of typical risk analysis/underwriting practice. While any bus company would have access to its claims history, and should be able to produce that as part of a bid response, they believed that insurers would not directly provide us that information without the permission of their insured.

Regardless, the sources generally agree that most bus accidents are caused by other drivers. But, even if we assume that CTC’s analysis, and the Administration’s analysis, both reflect useful information about how to analyze/understand accidents, there is not sufficient evidence to conclude that drivers in public or private systems are generally better or worse. If we assume that our drivers are generally better, then encouraging the good drivers to keep driving would make sense in either system. If we assume that some of our drivers should not continue to drive, then those decisions can be controlled by a management structure in either a public or private system.

Bus Drivers

The CTC asserted that the District’s “turnover rate is lower than outsourcing companies despite recent turmoil of displacing the depot for the new high school construction.” Do we have information showing that drivers have left in anticipation of relocating the bus depot? Until recently, we had not concluded that Acton and Billerica would be temporary locations during part of the new High School construction. Have drivers decided to leave District employment because of having to use those locations for the next three years? And, if so, how many drivers?

Further, the CTC asserted that the “turnover rate is higher currently because of driver uncertainty about the future of working here.” It may be reasonable to hypothesize that drivers will consider other employment if they believe that they won’t be employees of the District; that they might have to become employees of a contractor.

Driver turnover is relevant to safety when, for example, a driver is dismissed because his or her conduct (e.g. driving, on-bus management, loading/unloading) compromised safety. Driver turnover might affect safety if an operation is short staffed, causing a driver to drive more than typical (although still within federal limits; see FMCSA regulations). There may be level-of-service concerns because new drivers do not have local knowledge that can only be gained through time on the routes. But a new driver joining a public or private system would have the same local knowledge learning curve.

Driver Performance and Level of Service

Loading/Unloading; On-Bus Management – Having a bus monitor in addition to a bus driver may help improve bus stop loading/unloading and on-bus management. But Concord has not used bus monitors. The decision to have bus monitors is based on costs and benefits. Do we have sufficient on-bus problems that justify an additional employee on each bus? Probably not. Thus, at some point, a decision was made that the

additional personnel costs outweighed the benefits (because there were few benefits to be gained/few problems to resolve regarding on-bus and loading/unloading issues?).

Awareness of social and medical issues and proper responses to them - This is part of a “local knowledge.” Continuity helps the driver know children, their parents, and particular issues relevant to bus management. This is one area where one can perceive a better level of service because of better continuity, better knowledge of the families, and the families’ better knowledge of the bus drivers.

Route and road knowledge; knowledge of highway and railroad crossings (Don’t have information to compare public and private.)

On-time performance (to the extent that children wait too long for a bus) (Don’t have information to compare public and private.)

Driver training- Can/should driver training be improved? How best to do so? Do other systems have better driver training programs than ours?

Routes and Stops - The number of routes and numbers of stops affect cost. Fewer routes and/or fewer stops may mean lower operating costs. But, fewer routes and stops often mean there will be other frequent means of travel such as longer walks, more bicycling, and more private vehicle use. The use of more alternatives to buses not only shifts safety burdens to students and parents but also increases safety problems, e.g. more vehicle accidents (such as more driving by teenagers), bicycling, or walking accidents. (There may be efficiencies in route management that do not adversely affect, i.e. increase problems because of alternatives. Rita Skog, the Sudbury Transportation Coordinator, noted that the use of “transfinder software” significantly helped her on route planning. Sudbury also cut back on driving onto cul-de-sacs, and opted to stop at the intersections of cul-de-sacs and main roads for loading/unloading. Children walked further to reach a bus stop, but they concluded that the additional walks along cul-de-sacs did not adversely affect safety.)

This is one area where certain levels of service needs to be considered to attempt to distinguish where too few stops increase safety concerns. For example, at approximately 3:45 p.m. just this past Monday, I was driving behind a bus that stopped at three houses, within about a block of each other, along Old Marlboro Road (opposite the Concord Country Club) to let off a child at each of the houses. The children looked to be young, maybe first grade or younger. None of them had to walk along Old Marlboro Road to get to their homes, so they probably had the safest and most reassuring drop off that a parent could expect.

Similarly, we have multiple stops along Pine Street between Main and Riverside/Pleasant for middle school-aged children. Given that a bus travels along Pine anyway, the multiple stops probably do not affect operating costs but provide a convenient level of service. Regarding middle school-aged children, it’s not clear that their safety would appreciably change if they walked an additional block along Pine Street to reach a bus stop/to walk home.

Bus and Depot Security

As has been discussed, having an in-Town depot would mean that we should be able to achieve the same level of depot safety and security as we have at CCHS. For example, buses should be able to enter to/exit from Route 2A for a potential site at a CMLP depot location. Cannot discern if there would be any traffic safety difference between entering/existing Route 126 and Route 2A. Maybe traffic around the rotary might need to be factored for delays, just as the light at Route 126 and Route 2 would at a Town landfill depot location. Buses currently have to negotiate Route 2 intersections and the rotary.

Conclusion

The safety standards can, and should, be the same in any type of bus transportation system the District uses. The decision on what type of operation to have should not be based on only a belief that present driver performance and bus condition/maintenance are the best possible, or on a belief that they could be, and should be, improved. The obvious challenge is to consider all relevant factors and give reasonable weight to each factor. Perceived safety, differences in accident rates, and equipment maintenance, should likely not be determinative factors in deciding the most cost effective operation the District should support.

Sources:

- CTC minutes May 24, 2012; CTC minutes June 21, 2012; CTC Safety Report, September 19, 2012;
- *School Transportation Association of Massachusetts* (www.schoolbus.org) (many other states have similar trade associations);
- Highway Safety Division at the Executive Office of Public Safety and Security (Sheila Burgess, Director, 617-725-3307) (might have data and/or studies; no word back yet);
- Registry of Motor Vehicles (MA) (www.massdot.state.ma.us/rmv);
- *National Center for Statistics and Analysis (NCSA)* (www.nhtsa.gov/NCSA) (has School Bus Traffic Safety Fact Sheets on-line 1993-2009; publishes School Bus Driver In-Service Safety Series, a training curriculum “for experienced drivers in seven areas: driver attitude, student management, highway-rail crossing; vehicle training; knowing your route; loading and unloading; transporting infants and toddlers);
- All School District memoranda that contains its research;
- Chris Popov meeting with Wayne Busa, 8/17/12;
- *Federal Motor Carrier Safety Administration* (www.fmcsa.gov) (which links to NCSA above);
- *National School Transportation Association* (www.yellowbuses.org);
- *National Association of State Directors of Pupil Transportation* (www.nasdps.org);
- “Peer” school districts: Bedford, Lincoln, Lincoln/Sudbury, Acton, Acton/Boxboro, Weston, Lexington, Billerica, Chelmsford. [Bedford Charter Service; Sudbury: Rita Skag, Director of Transportation, 978-639-3215; Chelmsford: Pamela Rigoli, Transportation Coordinator, 978-251-5100;
- Local police departments (Officer Kevin Monahan of Concord assisting CTC in this, see CTC May 24, 2012, minutes);
- The School District keeps data on its insurance claims for the buses. Do insurers keep data about the bus operations they insure and how much data, if any, would those insurers share?
- “CTBSSP Synthesis 17, Special Safety Concerns of the School Bus Industry, a Synthesis of Safety Practice,” Transportation Research board of the National Academies, sponsored by the Federal Motor Carrier Safety Administration (2010).
- Commonwealth of Massachusetts Division of Insurance (617-521-7794).
- United States Adjusters (800-872-0201)

Notes from Sources:

- *Tim Ammon, Vice President, MPS (Management Partnership Services) 888-518-3377 x702*, (MPS has been in business for 12 years, provided consulting advice to 350 school districts in 27 states, including Weston, and 2 Canadian provinces, Ammon said that MPS has performed approximately 30 studies, each was individualized for the district — “no one size fits all”. Ammon

reported that he has an M.P.A. from American University; his staff consists of 6 transportation consultants; there may be three or four other outfits with more than few staff; he believes that most transportation consultants operate as individuals. Often, the advantages of public v. private systems are “perspective based” e.g. in-house, public unionized groups might view outsourcing differently from those who have been using private vendors. Ammon believes that vendors will, generally, save money for a school system but those savings may be based on levels of service and levels of pay/benefits for the drivers. The quality of management and the terms of the contract are the keys. School Districts cannot conclude that they are “out of the business” when they outsource (and even they were so inclined, legal requirements mean they retain lots of responsibility to run school transportation). Typically, outside contractors do not bring in their own drivers, they hire who is available. Ammon believes the perceptions about loss of control are not supported by the reality. Many districts moved to outsourcing because they had not been able to keep up with the capital costs of maintaining their own fleets, so they have often sold fleets, then leased/contracted.)

- *Bob Riley, Executive Director of the National Association of State Directors of Pupil Transportation Services, 970-871-1784.* (Nationally approximately 2/3's of buses are owned by school districts; 1/3 by vendors. State and federal safety requirements are nearly the same for public and vendors; driver training is the same. Some districts are great operators, some not; some vendors are great, some not. He believes that the “ideal” bus system is the one that costs the public the same i.e. the public should not pay more than is necessary. He knows of no safety data that differentiates public or private operations.)
- *Lynn Martin, assistant to the Executive Director, National Association of Pupil Transportation, 888-367-7242.* (She believes that nationally 60% to 70% are public operations; 30% to 40% are private operations. For example, in New York, much of the upstate operations are public, while New York City uses vendors.)
- *Ronna Weber, Executive Director, National School Transportation Association (NSTA), rwebber@yellowbuses.org.* (No studies that compare safety performance of public or private. NSTA also has an out-sourcing tool kit that might help with cost comparisons.)
- *Judith DuPille, Director of Safety Compliance at the Commonwealth of Massachusetts RMV. (857-368-7321)* (Management is the key. Vehicle maintenance generally the same between public and private state wide. Knows of no studies showing that public or private are better/worse when it comes to safety maintenance.
- *Rita Skog, Sudbury Transportation Coordinator, 978-639-3215.* (Has been outsourced, at least since the 70's. The key is that the Town retains control; they do not let the vendor dictate routes; communication between her and vendor-employed dispatcher good; likes the “transfinder software” to help make routes more efficient
- *Maureen Onigman, Lincoln Transportation Director, 781-259-2646.* (Maureen described their operation as being relatively small. Same family

has provided services for maybe 60 years; Lincoln typically gets only bid because the operation is small. Drivers know the kids and families, so things like epi-pens, and rounding up lost items are handled well. She thought that Newton did a survey about costs in reviewing its bus operations.

- *Weston* (781-786-5280; haven't spoken yet).
- *Acton* (978-264-4700; 978-264-3328; John D. Head, Lea Taylor; haven't spoken yet).
- *Billerica*: (978-528-7918; haven't spoken yet).
- *Chelmsford*: (Pam Rigoli, 978-251-5100) (Chelmsford has been using North Reading Transportation (NRT) for the schools' "big bus" operation for some time. Chelmsford more recently changed its operation for SPED transportation. She has safety meetings once per month, in which they review areas such as on-bus management, medical issues, such as use of epi-pens, bullying, etc. Believes that the key is putting what the district wants in its contract. She has liked the expertise that NRT has brought to the operation. Its dispatch operation has been very good for responses. Drivers typically stay with their routes; there is continuity. Turnover has not been a problem. Her level of service issues have been typically some complaints about buses arriving too late or too early, which, she believes are not unusual.)
- *Wayne Busa* (drivers trained for: RR and highway crossings; medical issues (epi-pen use); loading/unloading; social issues, bullying, behavioral issues, reporting of same; knowledge of parents; emergency evacuation; road knowledge, especially in snow conditions. Noted that most vehicular accidents caused by other driver hitting buses.

III. PROPERTIES CONSIDERED

Information included below is as accurate as possible as of document printing date 10.18.12, information could change after printing.

Properties for Consideration – Transportation Depot

Rank: 1 = most promising - Rank: 5 = eliminated with reasons noted

OWNER	LOCATION	SIZE	EXISTING USE	BUILDINGS CURRENTLY IN PLACE	CONTIGUITY, ZONE, NOTES	LAND COST	RANK	REASON FOR ELIMINATION
Town of Concord	Concord Municipal Light Plant (CMLP) Property 1175 Elm St.	24.17 acres	Light Plant	Maintenance Building, light plant offices, storage	See page 14 of this report under “Issues Related to Properties Ranked 1-3” for more information.	\$0	1	
Town of Concord	South portion of Concord Landfill site 755 Walden St.	2 acres	Landfill, DPW	Shed	See page 14 of the TAC report under “Issues Related to Properties Ranked 1-3” for more information.	\$0	1	
State of Ma. DPW	Land between the Light Plant and the rotary 23A Union Turnpike (Route 2) Concord	10.23 Acres	Undeveloped	none	See page 15 of the TAC report under “Issues Related to Properties Ranked 1-3” for more information.	\$230k assessed value of land	3	
Town of Concord	Keyes Road Facility		Maintenance and fueling of town vehicles	Maintenance, offices, fuel tank	Flood plain, property is heavily congested with no additional room for buses, parking, or maintenance Viable only for bus fueling		4	
Private Owner	Elks Lodge Concord	6.5	Elks Lodge	Meeting facility, some blacktop area	Assessed value is approximately \$900k, could be subdivided, Would need a traffic study. Elks are in discussion with church group, under agreement for sale for \$2.1	\$2.5M	4	

					No new information to indicate this will be a viable option.			
Concord Public Schools	Burke Land Old Bedford Road. Ripley Property	14	Farm	None	Meriam Road, farm land, environmentally sensitive land, agricultural use, soil designation (per Delia Kaye), configuration of property is complicated. See Agriculture Committee letter regarding this property– Attachment 2	n/a	4	
	Regionalize with Acton Public Schools						5	Acton leases buses; they have a small private lot with limited capacity for maintenance.
Private Owner	Knox Trail Concord	5.3		Large commercial/ industrial park	Parking only, no other use allowed. Would be East side of lot, property is currently in bankruptcy		5	No information to indicate this will be a viable option
Concord Public Schools	Sanborn School 835 Old Marlboro Road	31.3	School	School		n/a	5	SC extensively considered and rejected. Zone 2 no fueling allowed, Old Marlboro Rd., traffic study needed, concern from neighbors, parents, letter from teachers

								(see attachment 3).
Powder Mill zoning District	Town of Acton In the area of Stop and Shop						5	Properties are too small for current needs
Private Owner	109 Powder Mill Rd Concord	10 acres	Office Building	Paved lot, garage, and office building	Borders nearby Acton/Maynard	\$2.7M	5	Owner unwilling to subdivided property. Too costly/too large
Town of Acton	Post Office Land	3.6		Post Office building		\$895k	5	40b development planned
Private Owner	West Concord behind Citizens Bank/Baker Ave	2	Undeveloped	none		\$275k	5	No build within 50 feet from the river, small footprint of use available, close to wetlands and river/stream on two sides, traffic study needed, close to housing areas
Town of Concord	Wastewater Treatment Plant		Waste-water treatment				5	Current study under way for use - study will take 12 months, -heavy demand for this property
Concord Public Schools	Strawberry Hill Rd. Land	7.5	Farm	None		n/a	5	traffic considerations,

	41A Barrett's Mill Road							historic nature of property, letter from Agriculture Committee (See Attachment 2)
CCRS	Concord Carlisle High School property		School	School	Water conservancy district	n/a	5	vote from School Committees (See attachment 4a and 4b)
Concord Public Schools	Old Pickard Road	2	Septic treatment for Peabody	None			5	Need room for possible expansion of septic system
Town of Concord /State of Mass	Land behind State prison		Town uses for snow storage	none	Prison		5	Concord Housing Authority has planned use.
Private Owner	Damon Mill Parking lot Concord		Parking	Office Building(s)	Assabet River		5	Property too small
Private Owner	Acton Auto Auction	2+		Fenced blacktop, private entrance, wired, former site for Acton School bus parking			5	Not for sale, potential for short-term bus storage lease. Not zoned for parking of buses.
Private Owner	Taylor Rental Property Across from Stop and Shop						5	Owner expanding but has renters as of 7/18

IV. ISSUES RELATED TO PROPERTIES RANKED 1-3

Concord Municipal Light Plant (CMLP) Property at 1175 Elm Street - Ranking 1

- It appears that there is sufficient land at the CMLP property to build a bus depot that closely mirrors the current transportation depot, including parking for 36 buses, employee parking, bus fueling, administration and maintenance.
- The Town of Concord currently owns this property and there would be no cost for the land, and no time needed for acquisition of property.
- Clearing of trees, earthwork, paving, and a separate bus driveway entrance to Route 2a would be needed.
- Constructing and permitting a separate driveway for bus use on this property would be difficult due to wetlands and a certified vernal pool. (See attachment 5 for an image of this property)
- A driveway onto Route 2 would not be allowed by the State.
- A shared fuel tank sized to serve both CMLP and CPS could be a possibility
- A buffer between the facility and the Lalli Woods neighborhood would be needed.
- Buses would need to pass through the rotary and the beginning and end of their routes as they leave and return to the facility. Students would not be on the buses during this time when the buses would be entering and exiting the facility.
- The Town has investigated the possibility of using the existing maintenance building, parking facility, and fueling tank for use of the schools' transportation department. The current 1500 gallon CMLP fuel tank is not adequate to meet the needs of both CMLP and school vehicles, although it may be possible to purchase one larger tank for both departments to use. Several years ago there was a trial run of sharing the existing maintenance bays with police vehicles in the early and late hours of the day. This was discontinued as unworkable. The existing paved area is not adequate to accommodate parking for both CMLP vehicles and buses.

South Portion of Concord Former Landfill Site at 755 Walden Street – Ranking 1

- The TAC and the Town worked together to investigate the possibility of using a portion of the former town landfill located at 755 Walden St for a transportation depot. There is adequate land available on the South portion of the site, off the cap area, to accommodate a bus depot that closely mirrors the depot currently located on the Concord Carlisle High School campus. This site is attractive from an operations standpoint because it is close to our existing depot at CCHS.
- Nitsch Engineering created a sketch of the site. (Please see attachment 6 for the sketch.) Subsequent to the creation of that drawing, after discussions with the Town Manager, it appears that we may be able to cut into the embankment on the right side (South) to move the access road away from the steep slope to the storm water detention area. A guardrail would be necessary to ensure safety of vehicles. This change to the sketch could negate the need for a retaining wall, a likely a consideration with the plan shown in attachment 6.
- Massachusetts Department of Environmental Protection (Mass DEP) – On 10/16/12 the Town received a certification of closure for the landfill. (See attachment 7 for this document)
- An approved post closure permit, or similar permit, from the Mass. DEP is needed to construct a transportation facility, off the cap, in an area that was not previously landfilled.
- An engineering design and analysis will be required, a concern will be landfill gas migration, how it is monitored, and how it is managed.

- The Town of Concord accepted grant money for the landfill from The Massachusetts DEP in the year 2000 to help fund closure of the landfill. The grant money may have some use restrictions attached to it. The restrictions may represent an impediment to locating a bus depot on this property. This issue is currently being researched by the Town.
- The landfill site was purchased specifically for refuse disposal purposes. Therefore, in order for the transfer of custody from the Town to the schools to take place the land must first be declared surplus for that purpose by the Town Manager. Then, Ch. 40 section 15A would require a two-thirds vote of Town Meeting to change the custody.
- Concord Public Works has a small building on the property for temporary storage, the Town does not need that building, CPS could use as needed.
- Zoning – Municipal uses allowed in all zones.
- NRC – This property is not in a groundwater conservancy district. The wet area at the landfill appears to have been constructed as a storm water basin, with no up gradient wetlands. Therefore this area would not be subject to state or local wetlands jurisdiction. There are wetlands associated with Goose Pond but they appear to be greater than 100 feet from the proposed bus depot. The school department would need to consult further with NRC staff, and others, to evaluate costs or challenges on the site related to this issue.
- Public Works/ Concord Municipal Light Plant – The Town Manager has notified these departments and they see no problem with use of this site as a depot, as long as the areas at the front of the site currently in use are not included in the depot.
- Solar Use - Although the South area has been included in the RFP for solar power, due November 2nd 2002, the expectation is that this area would not provide much solar power.
- Power - May need underground conduit for power, current poles nearby owned by State and may be coming down.
- Abutters and other entities may object to placement of a bus depot at this location.

Land Between the CMLP and the Rotary – Ranking 3

- At over 10 acres, this property is large enough to accommodate a parking, maintenance, fueling and administration of a transportation depot.
- Since this land abuts the CMLP, it is of interest to the Town. The Town and the schools could collaborate to purchase this land.
- Access to this property would need to be built across CMLP property.
- The Massachusetts Department of Environmental Management has written to the Town stating an interest in this land as a place for relocation of current DPW activities from the former Town landfill, thus enhancing the possibility for conservation of the landfill. The expression of interest by the DEM may represent an impediment to locating the transportation depot on this property. The Town is researching this and transfer of this land is not likely to occur in the near term.

V. ASSUMPTIONS USED IN DEVELOPING COST ESTIMATE FRAMEWORK

- Cost estimates are simply estimates based on information available at the time of printing this document (10/18/12). Many costs are simply unknown until the site is chosen and/or new bids are requested by CPS or CCRSD.
- Land costs are assumed = \$0. This assumes CPS/CCRSD may use one of several potential properties currently owned by the Town of Concord or CPS. If no Town-owned or CPS-owned property is available, land acquisition costs must be added to these estimates.
- All estimates are subject to change given that site selection is unknown at this time.
- Estimates include data obtained through research conducted in February 2012 by the CPS/CCRSD School Administration.

- A feasibility study will be required for any option that includes the Bus Maintenance Building, Fuel Depot, Parking and Infrastructure. This study will be an overall project cost estimate.
- Project contingencies include design, construction and consulting contingencies.
- Capital costs assume retention of existing infrastructure of 36 buses and 42 employees.
- Annual debt service to support capital costs may be reduced or eliminated if the CPS Capital Construction Stabilization Fund monies are available.
- The administration building cost estimate assumes re-use of the existing building. (See attachment 8 of this report for quote from Mod Space for moving building.) If this is not possible, additional costs will be added to purchase/build a new Administration building.
- Cost estimate to replace the fuel tank is based on the quote from Northeastern Petroleum (5/03/12) (see Attachment 8 of this report for quote).
- Cost estimates for outsourcing options are derived from two separate vendor bids from First Student (12.07.11 and 4.17.12). The second bid figures reflect adjusted amounts as required by M.G.L. Ch 30b, 5f.
- Opportunities to share costs, benefits and resources across Town of Concord departments should be pursued wherever feasible. *Note the estimated CPS and CCRSD costs in this report do NOT reflect any potential reductions that may result from cost-sharing.*
- Costs to provide services to Concord Recreation and Emergency Preparedness are considered cost-neutral in this analysis. To date, these services have been provided to the Town of Concord by CPS to benefit all Concord citizens.

Potential Revenue Sources

Potential revenue sources were identified - but not estimated or evaluated as part of this analysis. Revenue sources may include one or more of the following:

- CPS Debt exclusion by the Town of Concord
- CPS Operating Budget
- CPS Capital Construction Stabilization Fund
- CPS Sale of Surplus Property
- CPS User Fees
- CCRSD Debt exclusion by Concord Carlisle Regional School District
- CCRSD Operating Budget
- CCRSD Capital Construction Stabilization Fund (residual from 1992 CCHS building renovations)
- CCRSD MA Regional Transportation reimbursement
- CCRSD MA METCO Transportation grant
- CCRSD User Fees

Options Considered in this Cost Estimate Framework

- Five different business models were considered by the TAC and are listed below in more detail.
 - Options #1, #2, and #3 assume rebuilding the bus depot and other buildings; options #4 and #5 assume no bus depot.
 - Options #1, #3 and #4 assume retention of a 36-bus fleet across both districts; Option #2 assumes retention of a 36-bus fleet by CPS only; and Option #5 assumes sale of the entire CPS/CCRSD fleet.
 - Option #1 assumes retaining full in-house operations; Option #2 assumes in-house operations for CPS only; Options #3, #4 and #5 assume outsourcing operations for both CPS and CCRSD.
- Inflation rates are estimated in all scenarios:
 - Personnel @ 2.25% annually
 - Fuel @ 8.5% annually
 - Utilities @5.0% annually

- All other costs @ 3.0% annually
- When the fleet is retained in Options #1-4, all insurance, registration and inspection costs are the responsibility of CPS/CCRSD.
- Option 1 figures are derived from FY13 budget numbers.
- Option 2 cannot utilize projections based on the first bid by First Student since this bid assumed full fleet retention. Instead the second First Student bid was used to derive estimates because selling the fleet to CPS does not allow CCRSD to retain the fleet. The second bid assumes sale of the fleet of 15 CCRSD buses at \$520,200 (based on FMV offer for fleet in Bid #2). This amount would be allocated over 3 years to reduce the contractual cost of outsourcing by \$173,400 per year for 3 years.
- Ten buses would be sold to CPS by CCRSD at an estimated cost of \$381,690.
- The internal operating fleet for Option #2 would reduce daily routes from 34 to 28, creating projected reductions. Three buses would be retained for spares in the CPS fleet, for a CPS fleet of 31 buses.
 - Driver staff reduction = 13.9%
 - Benefits reduction = 13.9%

Description of the Five Options in the TAC Framework

Option 1:

- Rebuild Bus Depot
- Assumes \$0 to Acquire Land
- Build Maintenance and Administration Buildings
- Provide Parking and Fueling for 36 Buses and 42 Other Vehicles
- Retain Ownership of Entire Fleet (36 buses: CPS = 21; CCRSD = 15)
- Retain Existing Owner-Operated Transportation System @ both CPS and CCRSD
- Most similar to current model through FY12

Option 2:

- Rebuild Bus Depot
- Assumes \$0 to Acquire Land
- Build Maintenance and Administration Buildings
- Provide Parking and Fueling for 31 Buses and 40 Other Vehicles
- CPS owns entire CPS Fleet (same as current CPS)
- CPS purchases all or part of the CCRSD fleet
- Retain Existing Owner-Operated Transportation System for only CPS (about 31 buses)
- Outsource CCRSD Operations only – estimates based on calculating the CCRSD portion of First Student Bid #2.
- Could potentially provide 30-minute earlier start time for CCHS

Option 3:

- Rebuild Bus Depot
- Assumes \$0 to Acquire Land
- Build Maintenance and Administration Buildings
- Provide Parking and Fueling for 36 Buses and 42 Other Vehicles
- Retain Ownership of Entire Fleet (36 buses: CPS = 21; CCRSD = 15)
- Outsource Both CPS and CCRSD Operations

Option 4:

- No Bus Depot
- No Maintenance and Administration Buildings
- No Parking for Buses or Other Vehicles
- Retain Ownership of Entire Fleet (36 buses: CPS = 21; CCRSD = 15)
- Outsource Both CPS and CCRSD Operations
- Framework for Bid #1 from First Student

Option 5:

- No Bus Depot
- No Maintenance and Administration Buildings
- No Parking for Buses or Other Vehicles
- No Fleet Ownership by CPS or CCRSD
- Outsource Both CPS and CCRSD Operations
- Framework for Bid #2 from First Student

VI. COST ESTIMATE FRAMEWORK TABLE

TAC COST ANALYSIS 10/19/2012	1. Build Bus Depot on Land with \$ Acq. cost Build Maintenance and Admin Buildings Parking & Fueling for 36 Buses and 42 Vehicles Maintain Ownership of Entire CPS/CCRSD Fleet CPS Buses = 21; CCRSD Buses = 15 Retain Owner-Operated CPS + CCRSD (3 Tiers) Most Similar to Current Model				2. Build Bus Depot on Land with \$0 Acq. cost Build Maintenance and Admin Buildings Parking & Fueling for 31 Buses and 40 Vehicles CPS Maintains Ownership of Entire Fleet = 36 CPS Purchases 13-15 Buses from CCRSD Retain Owner-Operated CPS only (2 Tiers) Outsource CCRSD Operations (refer to Bid #2) Provide 30 minute earlier start time @ CCHS			
	Option 1	Op Costs	Op Costs	Option 1	Option 2	Op Costs	Op Costs	Option 2
	Start-up			TOTAL	Start-up			TOTAL
	Costs	1 Year	5 Years	TOTAL	Costs	1 Year	5 Years	TOTAL
Overall Project Costs								
Feasibility Study for Bus Repair Building, Admin Building, Fuel Depot, Parking & Infrastructure	\$50,000	\$0	\$0	\$50,000	\$50,000	\$0	\$0	\$50,000
Consultant Costs: Design Services, Legal Fees, Management Fees, Permitting Fees	TBD			TBD	TBD			TBD
Project Contingencies 15%	TBD			TBD	TBD			TBD
Annual Debt Service if Needed*				\$0				\$0
Capital Costs: Bus Repair Building*				\$0				\$0
Land/Building Acquisition*	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0
Constructions: Building, Site Prep, Utilities	\$401,438	\$0	\$0	\$401,438	\$401,438	\$0	\$0	\$401,438
Capital Costs: Administration Building*				\$0				\$0
Disassemble and reassemble Existing Administration Building (new Admin building would be \$217,776, or \$115,226 extra)	\$102,500	\$0	\$0	\$102,500	\$102,500	\$0	\$0	\$102,500
Site/Utilities	\$20,000			\$20,000	\$20,000			\$20,000
Septic Install and Design	\$25,000			\$25,000	\$25,000			\$25,000
Site Work for Auto Parking for Staff	\$20,000			\$20,000	\$20,000			\$20,000
Project Contingencies 15%	\$15,000			\$15,000	\$15,000			\$15,000
Capital Costs: Fuel Depot*				\$0				\$0
Constructions: Install Fuel Pumps*	\$91,977	\$0	\$0	\$91,977	\$91,977	\$0	\$0	\$91,977
Capital Costs: Parking & Retain Infrastructure (36 buses; 42 employees)				\$0				\$0
Site Construction and Infrastructure	\$175,000	\$0	\$0	\$175,000	\$175,000	\$0	\$0	\$175,000
Paving @ \$100K per acre	\$200,000			\$200,000	\$200,000			\$200,000
TOTAL CAPITAL COSTS	\$1,100,915	\$0	\$0	\$1,100,915	\$1,100,915	\$0	\$0	\$1,100,915
Fleet Operating Expenses								
If fleet not owned: fleet annual lease	\$0	\$0	\$0	\$0	\$0			\$0
If fleet owned: vehicle purchase costs @ \$95k per bus (4 buses per year for CPS/CCRSD; 3 buses per year CPS only)	\$0	\$380,000	\$1,900,000	\$1,900,000	\$0	\$285,000	\$1,425,000	\$1,425,000
Outsource Costs: Vendor Bids	\$0	\$0	\$0	\$0	\$0	\$877,921	\$4,418,650	\$4,418,650
Revenue from fleet sale	\$0	\$0	\$0	\$0	\$0	(\$520,200)	(\$520,200)	(\$520,200)
Cost from fleet purchase	\$0	\$0	\$0	\$0	\$0	\$381,690	\$381,690	\$381,690
Off set for use of facility	\$0	\$0	\$0	\$0	\$0	TBD	TBD	\$0
Total Outsource Cost	\$0	\$0	\$0	\$0	\$0	\$739,411	\$4,280,140	\$4,280,140
Annual vehicle maintenance	\$0	\$164,616	\$873,969	\$873,969	\$0	\$164,616	\$873,969	\$873,969
Annual vehicle inspections	\$0	\$3,500	\$18,582	\$18,582	\$0	\$3,500	\$18,582	\$18,582
Commercial garage: Maintenance	\$0	\$42,000	\$232,440	\$232,440	\$0	\$0	\$0	\$0
Fleet insurance	\$0	\$11,393	\$60,487	\$60,487	\$0	\$11,393	\$60,487	\$60,487
Fuel	\$0	\$175,207	\$1,038,167	\$1,038,167	\$0	\$150,873	\$893,977	\$893,977
Utilities costs - electricity, etc.	\$0	\$15,539	\$85,863	\$85,863	\$0	\$15,539	\$85,863	\$85,863
TOTAL FLEET OPERATIONS COSTS	\$0	\$792,255	\$4,209,507	\$4,209,507	\$0	\$1,370,332	\$7,638,017	\$7,638,017
Personnel Expenses								
Personnel, Driver	\$0	\$1,095,514	\$5,729,669	\$5,729,669	\$0	\$680,217	\$3,557,616	\$3,557,616
Personnel, Mechanic	\$0	\$170,246	\$890,407	\$890,407	\$0	146,601	\$766,739	\$766,739
Personnel, Administration	\$0	\$194,077	\$1,015,046	\$1,015,046	\$0	194,077	\$1,015,046	\$1,015,046
Personnel, Driver Overtime	\$0	\$20,379	\$106,585	\$106,585	\$0	\$14,203	\$74,283	\$74,283
Personnel, Mechanic Overtime	\$0	\$13,294	\$69,529	\$69,529	\$0	13,294	\$69,529	\$69,529
Employee Benefits (retirement + healthcare)	\$0	\$279,219	\$1,482,412	\$1,482,412	\$0	240,439	\$1,276,521	\$1,276,521
Driver training	\$0	\$38,000	\$201,747	\$201,747	\$0	38,000	\$201,747	\$201,747
Driver licenses	\$0	\$6,854	\$36,389	\$36,389	\$0	5,963	\$31,658	\$31,658
TOTAL PERSONNEL EXPENSES	\$0	\$1,817,583	\$9,531,784	\$9,531,784	\$0	\$1,332,793	\$6,993,141	\$6,993,141
TOTAL ESTIMATED COSTS	\$1,100,915	\$2,609,838	\$13,741,291	\$14,842,206	\$1,100,915	\$2,703,125	\$14,631,158	\$15,732,073
<i>CPS Retirement benefits carried in Town Budget</i>								

TAC COST ANALYSIS 10/19/2012	3. Build Bus Depot on Land with \$0 Acq. cost Build Maintenance and Admin Buildings Parking & Fueling for 36 Buses and 42 Vehicles Maintain Ownership of Entire CPS/CCRSD Fleet CPS Buses = 21; CCRSD Buses = 15 Outsource Both CPS and CCRSD Operations Refer to Bid #1				4. No Bus Depot No Maintenance or Admin Buildings No Parking for Buses or Driver Vehicles Maintain Ownership of Entire CPS/CCRSD Fleet CPS Buses = 21; CCRSD Buses = 15 Outsource Both CPS and CCRSD Operations Refer to Bid #1				5. No Bus Depot No Maintenance or Admin Buildings No Parking for Buses or Driver Vehicles No Fleet Ownership by CPS or CCRSD Sell Entire CPS and CCRSD Fleet Outsource Both CPS and CCRSD Operations Refer to Bid #2			
	Option 3	Op Costs	Op Costs	Option 3	Option 4	Op Costs	Op Costs	Option 4	Option 5	Op Costs	Op Costs	Option 5
	Start-up Costs	1 Year	5 Years	TOTAL	Start-up Costs	1 Year	5 Years	TOTAL	Start-up Costs	1 Year	5 Years	TOTAL
Overall Project Costs												
Feasibility Study for Bus Repair Building, Admin Building, Fuel Depot, Parking & Infrastructure	\$50,000	\$0	\$0	\$50,000	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0
Consultant Costs: Design Services, Legal Fees, Management Fees, Permitting Fees	TBD			TBD	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0
Project Contingencies 15%	TBD			TBD	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0
Annual Debt Service if Needed*				\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0
Capital Costs: Bus Repair Building*				\$0				\$0				\$0
Land/Building Acquisition*	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0
Constructions: Building, Site Prep, Utilities	\$401,438	\$0	\$0	\$401,438	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0
Capital Costs: Administration Building*				\$0				\$0				\$0
Disassemble and reassemble Existing Administration Building (new Admin building would be \$217,776, or \$115,226 extra)	\$102,500	\$0	\$0	\$102,500	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0
Site/Utilities	\$20,000			\$20,000				\$0				\$0
Septic Install and Design	\$25,000			\$25,000				\$0				\$0
Site Work for Auto Parking for Staff	\$20,000			\$20,000				\$0				\$0
Project Contingencies 15%	\$15,000			\$15,000				\$0				\$0
Capital Costs: Fuel Depot*				\$0				\$0				\$0
Constructions: Install Fuel Pumps*	\$91,977	\$0	\$0	\$91,977	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0
Capital Costs: Parking & Retain Infrastructure (36 buses; 42 employees)				\$0				\$0				\$0
Site Construction and Infrastructure	\$175,000	\$0	\$0	\$175,000	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0
Paving @ \$100K per acre	\$200,000			\$200,000				\$0	\$0	\$0	\$0	\$0
TOTAL CAPITAL COSTS	\$1,100,915	\$0	\$0	\$1,100,915	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0
Fleet Operating Expenses												
If fleet not owned: fleet annual lease	\$0			\$0	\$0			\$0	\$0			\$0
If fleet owned: vehicle purchase costs @ \$95k per bus (4 buses per year for CPS/CCRSD; 3 buses per year CPS only)	\$0	\$380,000	\$1,900,000	\$1,900,000	\$0	\$380,000	\$1,900,000	\$1,900,000	\$0	\$0	\$0	\$0
Outsource Costs: Vendor Bids		\$1,811,833	\$9,286,453	\$9,286,453		\$1,811,833	\$9,286,453	\$9,286,453		\$2,446,892	\$12,534,331	\$12,534,331
Revenue from fleet sale	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	(\$531,900)	(\$1,595,700)	(\$1,595,700)
Cost from fleet purchase	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0
Off set for use of facility	\$0	TBD	TBD	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0
Total Outsource Cost	\$0	\$1,811,833	\$9,286,453	\$9,286,453	\$0	\$1,811,833	\$9,286,453	\$9,286,453	\$0	\$1,914,992	\$10,938,631	\$10,938,631
Annual vehicle maintenance	\$0		\$0	\$0	\$0		\$0	\$0	\$0		\$0	\$0
Annual vehicle inspections	\$0	\$3,500	\$18,582	\$18,582	\$0	\$3,500	\$18,582	\$18,582	\$0		\$0	\$0
Commercial garage: Maintenance	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0		\$0	\$0
Fleet insurance	\$0	\$11,393	\$60,487	\$60,487	\$0	\$11,393	\$60,487	\$60,487	\$0		\$0	\$0
Fuel	\$0		\$0	\$0	\$0		\$0	\$0	\$0		\$0	\$0
Utilities costs - electricity, etc.	\$0	\$15,539	\$85,863	\$85,863	\$0		\$0	\$0	\$0		\$0	\$0
TOTAL FLEET OPERATIONS COSTS	\$0	\$2,222,265	\$11,351,385	\$11,351,385	\$0	\$2,206,726	\$11,265,522	\$11,265,522	\$0	\$1,914,992	\$10,938,631	\$10,938,631
Personnel Expenses												
Personnel, Driver	\$0		\$0	\$0	\$0		\$0	\$0	\$0		\$0	\$0
Personnel, Mechanic	\$0		\$0	\$0	\$0		\$0	\$0	\$0		\$0	\$0
Personnel, Administration	\$0		\$0	\$0	\$0		\$0	\$0	\$0		\$0	\$0
Personnel, Driver Overtime	\$0		\$0	\$0	\$0		\$0	\$0	\$0		\$0	\$0
Personnel, Mechanic Overtime	\$0		\$0	\$0	\$0		\$0	\$0	\$0		\$0	\$0
Employee Benefits (retirement + healthcare)	\$0		\$0	\$0	\$0		\$0	\$0	\$0		\$0	\$0
Driver training	\$0		\$0	\$0	\$0		\$0	\$0	\$0		\$0	\$0
Driver licenses	\$0		\$0	\$0	\$0		\$0	\$0	\$0		\$0	\$0
TOTAL PERSONNEL EXPENSES	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0
TOTAL ESTIMATED COSTS	\$1,100,915	\$2,222,265	\$11,351,385	\$12,452,300	\$0	\$2,206,726	\$11,265,522	\$11,265,522	\$0	\$1,914,992	\$10,938,631	\$10,938,631
CPS Retirement benefits carried in Town Budget												

VII. THANKS

The Transportation Advisory Committee would like to thank the following for their assistance in our research:

- The Citizens Transportation Committee
- The Concord Public Schools/Concord-Carlisle Regional School District Transportation Department Staff
- Wayne Busa, Transportation Manager, Concord Public Schools/Concord-Carlisle Regional School District
- Chris Whelan, Concord Town Manager
- Richard Reine, Director of Concord Public Works, and The Concord Public Works Staff
- David Wood, Director of Concord Municipal Light Plant, and The Concord Municipal Light Plan Staff
- Delia Kaye, Natural Resource Director, and The Concord Division of Natural Resource Staff
- Marcia Rasmussen, Director of the Concord Planning Department, and the Concord Planning Department Staff
- The Concord Board of Selectmen
- The Concord Finance Committee
- Anthony Logalbo, Concord Town Finance Director
- Matthew Wells, Senior Business Analyst, Concord Public Schools/Concord-Carlisle Regional School District
- Sally W. Ferguson, Senior Administrative Secretary, Concord Public Schools/Concord-Carlisle Regional School District

VIII. ATTACHMENTS AND ABBREVIATIONS

Attachment 1 - Transportation Advisory Committee Charge

Approved - 6/19/12

Student Transportation for Concord Public Schools and the Concord-Carlisle Regional School District

The goal of the School Committees and the School Administration is to provide safe, reliable, cost-effective transportation for students.

Transportation Advisory Committee Charge: The Transportation Advisory Committee (TAC) is responsible for researching all feasible methods of providing safe, economic, reliable transportation for students in Concord Public Schools (CPS) and the Concord Carlisle Regional School District (CCRS). The TAC will conform to District Policy BDF: Advisory Committees to the School Committee, all other District Policies, and Massachusetts General Laws. The TAC will abide by all School Committee policies governing citizens, committees and the relationship of these committees to the School Committee as a whole, individual School Committee members, the Superintendent, and other members of the professional staff. There will be an expectation that the TAC will collaborate with existing Town Committees and Boards. The TAC will make a comprehensive presentation to the School Committees at the October 23, 2012 Joint School Committee meeting.

Tasks of the Transportation Advisory Committee

Transportation Facility Site Selection

1. The TAC will assess potential sites for the location of a transportation facility. The facility may include a maintenance garage, on-site school bus storage, administrative space, and a fuel tank.
2. The transportation facility site will conform to state and local regulations regarding zoning, natural resources, and sustainable practices.
3. Serious consideration will be given to public safety and impact on neighbors.
4. Serious consideration will be given to environmental impact and best practices for environmental sustainability.
5. The TAC may consider land held by the Town of Concord and private land. Land held by the Concord-Carlisle Regional School District cannot be considered.

Evaluation

1. The TAC will develop a series of options that allow the School Committees to assess comparative costs and benefits between owner-operated student transportation services and contracted student transportation services.
2. The TAC will develop timelines for land acquisition, financing, construction, and other anticipated aspects of the development of an owner-operated student transportation facility.
3. The TAC will develop accurate estimates for the cost of land acquisition, construction, permitting fees, bus fleet acquisition, maintenance expenses, personnel expenses, and other anticipated expenses associated with owner-operated student transportation services and facilities.

4. The TAC will specifically investigate sources of funding other than the CPS and CCRSD operating budgets for both the development of the transportation facility and the ongoing capital and other associated expenses for owner-operated student transportation services.
5. The TAC will review safety standards for student transportation, including driver training, driver certification, and incident reports, where it does not violate employee confidentiality.
6. The TAC will consider scenarios for providing transportation for Concord Public Schools and the Concord-Carlisle Regional School District together and providing transportation for the Concord Public Schools and the Concord-Carlisle Regional School District separately. Special consideration should be given to outsourcing transportation at CCRSD only.

Final Report to the School Committees

The TAC will create a final comprehensive compilation of all the information described above to present to the School Committees on October 23, 2012. The TAC may report to the School Committees prior to October 2012, as requested by the School Committees.

Background and Housekeeping

1. The TAC will review the Transportation Reports, responses to RFPs, responses to IFBs, School Committee Updates, and any other relevant documents regarding student transportation. The TAC will understand the articulated needs, including the specifications of the existing service and facilities.
2. When consulting with Town and District employees, Town Board and Committee members, and other relevant persons, notes will be taken and appended to committee meeting minutes.
3. School employees may attend a TAC meeting in their official capacity with prior approval of the Superintendent and with a concrete articulation of the purpose of the employee's attendance at the meeting.
4. The TAC reports directly to the School Committees, and shall abide by the Open Meeting Law and Public Records Law in all of its activities, and create and maintain accurate minutes of all Committee meetings. Committee members are urged to not participate in online forums, blogs or chat rooms in any discussion of the Committee's activities, due to the potential of violating the Open Meeting Law.

It is the hope that the Committee will share its findings with the public through proper channels, such as the School Department's web site, public hearings, or other written documents which will be made available to the public.

Composition of the Committee: The composition of the Transportation Advisory Committee will be broadly representative and will take into account the specific tasks assigned to the committee. The membership will encompass the range of expertise necessary for a comprehensive evaluation, along with representatives from the community. Appointments will be made by the School Committees.

The Committee will include:

School Committee Members (2)

Deputy Superintendent of Finance and Operations

Concord Public Schools PTG Representatives (1 for Elementary, 1 for CMS)

Concord-Carlisle High School PA Representative

Member of the community (preference given to a member of the
Citizens Transportation Committee)

Observer from the Concord Finance Committee

Liaison with the Concord Board of Selectmen

Members at large with areas of expertise to be represented:

Consultation with the Concord Town Manager

Member of the community with expertise in Finance

Member of the community with expertise in Construction and Zoning

Member of the community with expertise in Natural Resources and Sustainability Practices

If volunteers cannot be found in these areas of expertise, the TAC will be expected to consult with relevant Town Board and Committee members. The School Committees reserve the right to appoint additional members with expertise in areas that would be useful for the committee.

The TAC will be co-chaired by a School Committee member and another member elected by the TAC. Two School Committee members may serve as Co-Chairs.

Appendix: District Policy BDF Advisory Committees to the School Committee

Attachment 2 – Letter from Concord Agriculture Committee regarding placement of transportation depot on Burke Land and Strawberry Hill Road

July 30, 2012

To the School Committee –

The Concord Agriculture Committee has learned that the School Committee is considering the use of two agricultural fields for a relocated bus maintenance facility. We want to record our strong opposition to use of either of these sites for a use other than agriculture. Both the McGrath field at the corner of Strawberry Hill and Barretts Mill Roads, and the Burke land on Old Bedford Road are excellent farm fields in active agricultural use. They are located in rural parts of town, with neighboring parcels protected under conservation or historic preservation. The School Committee should expect that any actual proposal to use either of these fields for this purpose will be met with strong opposition from many quarters of Town. In fact, it is hard to imagine any public support for either of these proposed sites.

Use of actively farmed land to build a bus depot would run counter to Concord's goals to preserve natural resources, support agriculture, and promote sustainable practices. Since we oppose using excellent farm land for this purpose, we feel obliged to note that other potential locations to site a bus maintenance facility already exist in Town. We suggest that the School Committee reconsider committing a portion of the extensive High School campus to continue this use. The Town Planning Department has suggested using a portion of the landfill site, an excellent suggestion in our opinion. Additionally, there is a sizable, already paved and vacant parking lot at General Radio on Baker Avenue in West Concord that could be considered. Any of these locations would be better solutions than disturbing productive agricultural land.

Please feel free to contact us about any farming issues in Town.

Sincerely,

Jennifer Hashley, Chair, Agriculture Committee

CC: Carmin Reiss, Chair of the Selectmen Members of the Concord Agriculture Committee

Attachment 3 – Letter from Concord Middle School teachers regarding placement of bus depot on Sanborn property

June 20, 2012

To: Diana Rigby

From: Teachers and Staff at Concord Middle School

Dear Diana,

We the teachers and staff of Concord Middle School have serious objections to the Concept B staff and bus parking proposal plan.

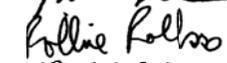
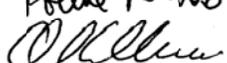
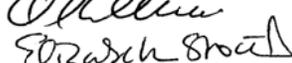
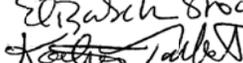
- Concept B plans completely contradict the district goal of green learning spaces for students. While millions of dollars have been spent and are being spent to make Concord's other schools environmentally friendly, this would accomplish just the opposite: permanently uproot trees – and displace the habitat they support; grassy, shaded, welcoming play areas paved over to put up a parking lot.
- This proposal sets a dismal model for our students and what we teach them about being stewards of the environment.
- With virtually all of the after-school activities and evening events held at Sanborn, there is continuous student/parent traffic. To mix a fleet of buses into that traffic feels highly unsafe.
- Given the tight budgets, the hard costs of this "temporary" solution do not add up.
- In good faith, we at the middle school have supported the beautiful new buildings at the other levels. This proposal only cements an impression that the middle school is valued the least.

We are Concord residents and long-term employees who have observed this town – through a long tradition of discussion and problem-solving – create sustainable solutions. We know that destroying our environment is not and must not be the only option. We are eager to participate in a win/win process that locates a home for the buses and aligns itself with Concord's proud history of environmental leadership.

Concept Plan B is not acceptable.

Yours,


Kevin Lynch

Jan Fin

Hollie Kollros

O'Hellon

Elizabeth Smith

Kathleen Talbot


Barbara Beaker

Fran Labadie

S. King

Christine Palkovits

Phil D. Stone


Susan De

Amy

Mary

Vanessa Brown

Attachment 4a – Letter from CPS/CCRSD Chairs regarding placement of transportation depot on CCHS property

6/22/12

To: Carmin Reiss, Chair, Concord Board of Selectmen

Fr: Maureen Spada and Fabian Fondriest, Chairs, CPS and CCRSD

Re: School Committee decision to restrict CCHS land from consideration as a transportation depot.

Carmin,

On May 22, 2012 the School Committees voted unanimously to restrict Concord Carlisle High School land from consideration as a permanent transportation facility. Key reasons for that decision are outlined below.

- We are working hard to reduce the amount of impermeable surfaces (roofs, roads, and walks) from the current percentage of above 20% to the allowable percentage of 15%. Adding additional buildings and paving for a bus depot puts us far out of compliance on the high school land.
- From an environmental planning point of view, the high school sits in a water conservancy district because of its' proximity to the town well. We do not consider it responsible to rebuild a new transportation depot in the water conservancy district.
- We estimate that 1.5-2 acres would be needed to replace the existing transportation depot. While the high school property is large, much of the land is currently in use for soccer, track, football, lacrosse, field hockey, Town youth athletic teams, and many other sports. One need only to drive by the campus at 2:30 p.m. during spring and fall sports seasons to see hundreds of students using those fields each afternoon. We consider it unacceptable to consider removing athletic fields that are heavily used, and replace them with a transportation depot.
- The other side of the campus, near the student parking lot, closely abuts Bristers Hill Road. We have heard strong concerns from Bristers Hill Road residents about parking buses at that corner of the property. In fact, our plan to house the buses temporarily on the Sanborn property is directly in response to those concerns.
- Land on the high school campus is reserved for: possible long-term expansion of the high school, to replace existing athletic facilities disrupted by the construction project, or to expand our current athletic fields.
- The CCRSD includes stakeholders in both Concord and Carlisle. While Concord is involved in research to seek alternative plans to replace the depot, the Carlisle Board of Selectmen and Finance Committee have clearly stated their lack of interest in engaging in a capital project for these facilities.

- With the School Administration, the School Committees, the Transportation Advisory Committee, and the Citizens Transportation Committee all working to resolve the issue of long term student transportation, we are confident that acceptable solutions do exist without the risk, complications, and untenable compromises that would be needed to house transportation on the high school campus.

Should you have further questions about this decision please feel free to contact us.

Thank You,

Fabian Fondriest and Maureen Spada

Attachment 4b – Letter from Carlisle Board of Selectmen and Finance Committee Chairs regarding transportation services – page 1



Town Administrator
Tel. (978) 371-6688

Town of Carlisle

Office of

BOARD OF SELECTMEN

66 WESTFORD STREET
CARLISLE, MASSACHUSETTS 01741
TEL. (978) 369-6136



Fax. (978) 318-0098

May 8, 2012

Fabian Fondriest, Chair
Concord Carlisle Regional School Committee
120 Meriam Road
Concord, Massachusetts 01742

Dear Mr. Fondriest,

Knowing that the CCHS School Committee will be reviewing the transportation issue at your meeting this week, we thought it might be appropriate to outline what we consider to be the Town of Carlisle's position regarding busing issues at the High School.

First, I would like to state clearly that Carlisle Town officials have no concerns whatsoever with the potential of outsourcing the transportation for our students who attend the High School. We have outsourced the busing at the Carlisle School for many years and have had no notable issues with service, cost or safety. We have seen stability with drivers who work with the contractor and the parents have great faith in the system and the personnel. Given that experience, we have no philosophical objections to the potential outsourcing of the High School busing.

With regard to the potential of a capital outlay for a facility in Concord should you decide not to outsource the busing, we believe that to be primarily a Concord issue. If this is the direction you choose, we strongly recommend that you build and own the facility as a Concord resource. If the CCHS School Committee chooses to use the Concord in-house system, we would recommend that an operations charge be allocated to the High School. Carlisle would, as we normally do for all expenses, share proportionately in the expenses for the High School students. We do not recommend asking the Carlisle voters to vote to fund a facility which will primarily be used for Concord Public Schools. That second election is something I'm sure you would like to avoid.

Accordingly, we believe that participation on a Committee to study transportation is a Concord issue. Therefore, we do not consider it appropriate to have Carlisle involvement on the Committee. We are comfortable with outsourced services and we have been comfortable with the services as they were previously provided. The issues that have arisen seem to be Concord specific.

We are all obviously concerned with costs. We have faith that the High School Administration and the CCHS School Committee will make a good decision balancing the need to control costs along with the need for excellent service and a high level of safety.

Attachment 4b – Letter from Carlisle Board of Selectmen and Finance Committee Chairs regarding transportation services – page 2

We have enjoyed a tremendous relationship with Concord in sharing a truly exceptional High School. The fact that both towns overwhelmingly supported the new facility by almost identical margins indicates the strength of the partnership we have. Good luck with your deliberations regarding the busing. I hope this information is helpful to you.

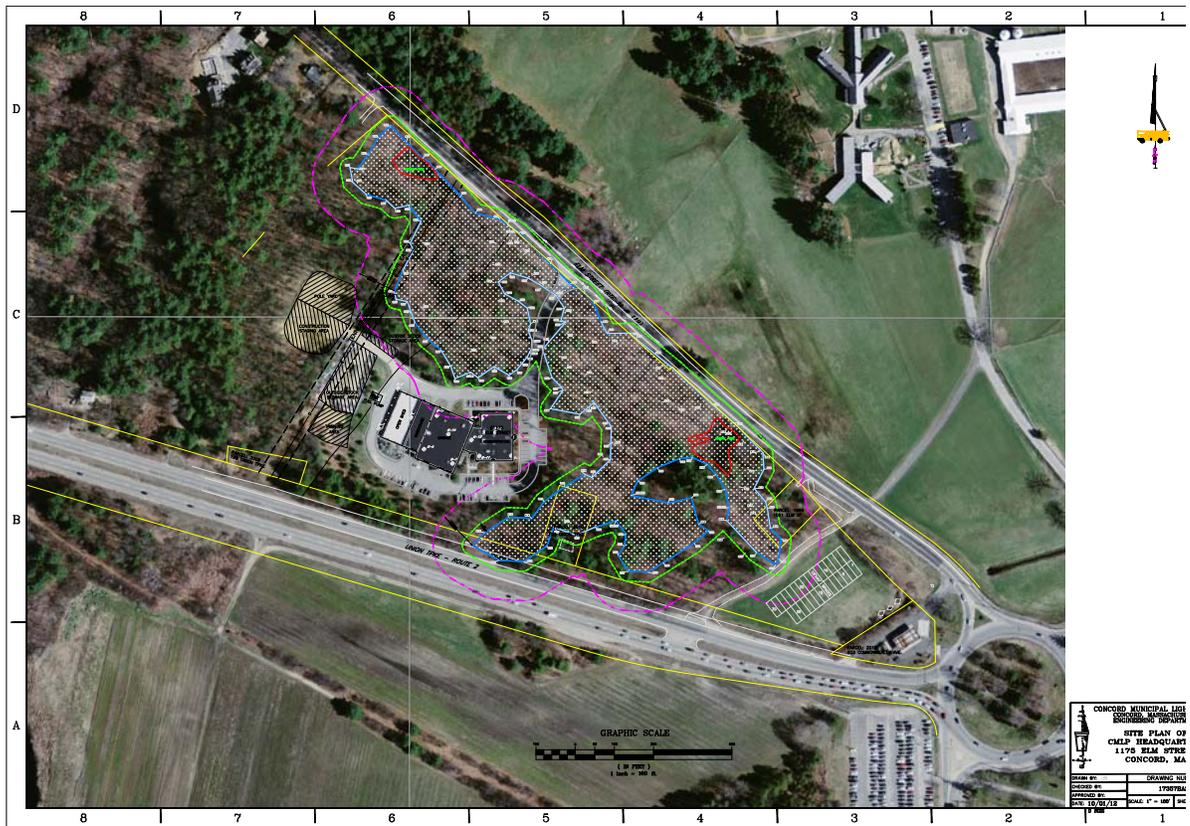
Sincerely,


Douglas Stevenson
Chairman, Carlisle Board of Selectmen

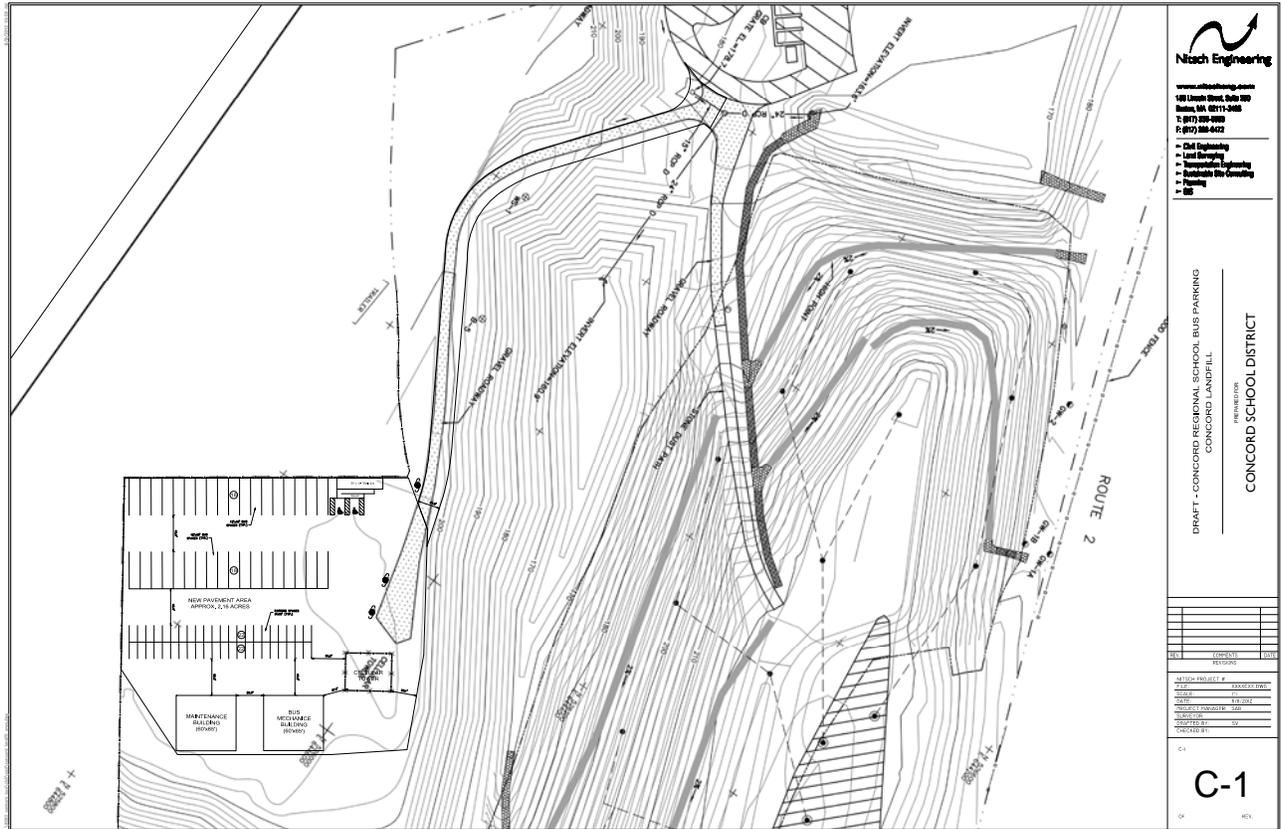

Jerry Derman
Chairman, Carlisle Finance Committee

cc:
Christopher Whelan, Concord Town Manager
Diana Rigby, Carlisle Superintendent of Schools
Louis Salemy, Member, CCHS School Committee
Tim Goddard, Carlisle Town Administrator
Carmin C. Reiss, Chairman, Concord Board of Selectmen.

Attachment 5 - Concord Municipal Light Plant Property Image



Attachment 6 – Nitsch Engineering Drawing of possible Depot at Concord Town Landfill Site – 755 Walden Street



Attachment 7 - Massachusetts Department of Environmental Protection Certificate of Closure of Landfill at 755 Walden Street

October 16, 2012

Richard K. Reine, Director
Town of Concord
Department of Public Works
133 Keyes Road
Concord, MA 01742

Re: CONCORD – Solid Waste/COR
Concord Landfill
FMF Number: 39182
Determination of Completion of Closure

Dear Mr. Reine:

The Massachusetts Department of Environmental Protection, Bureau of Waste Prevention, Northeast Regional Office, Solid Waste Management Section (MassDEP) has reviewed your application for determination of completion of the closure of the Concord Sanitary Landfill at 755 Walden Street, Concord, Massachusetts (the "landfill"). The application was prepared on your behalf by Weston & Sampson Engineers, Inc., Peabody, Massachusetts (WSE).

The landfill was opened for receipt of waste in 1959.

Operation and closure of the landfill was designed for seven (7) phases, designated 0, 1A, 1B, 2, 3, 4A and 4B, plus an adjacent stump dump.

Disposal of waste in the landfill was terminated with completion of Phase 2. Phases 3, 4A and 4B will not be constructed. In 2003 the area of Phase 3 was converted to use as a municipal recycling facility. In 2000 a cellular communications facility was installed in the area of Phase 4A.

Construction of the cap on the Phases 1A and 2 was completed in 2001. The caps on Phases 0 and 1A were constructed circa 1981 and 1989, respectfully. The cap on the stump dump was constructed circa 1988.

Phases 0, 1A and the stump dump were each closed with a soil cap. Phases 1B and 2 were closed with a flexible membrane ("FML") cap.

Pursuant to this application, the Town, through its consulting engineers (WSE), has submitted documentation of the completion of the construction of the cap on Phases 1B and 2, and the stump dump.

By letter dated June 8, 1995, MassDEP determined that construction of the cap on Phases 0 and 1A was complete. Pursuant to review of this application, MassDEP has determined the documents certifying completion of the cap on Phases 1B and 2, and the stump dump, demonstrate that closure of these portions of the landfill have been completed.

Therefore, pursuant to M.G.L. Chapter 111, §150A and 310 CMR 19.045(4), et al, MassDEP has determined the landfill to be closed.

Pursuant to M.G.L. Chapter 111, §150A, M.G.L. Chapter 21H, and the regulations promulgated there under (310 CMR 19.000), the Town shall maintain, monitor and take remedial actions as necessary, including, but not limited to:

1. Pursuant to 310 CMR 19.130(32), shall not take, nor allow, disturbance of the waste or the final cover without approval by MassDEP.
2. Pursuant to 310 CMR 19.142(5), shall:
 - a. Maintain the landfill and its cap, including, but not limited to, the integrity of the final cover, access roads and gas control systems; and shall protect and maintain surveyed benchmarks.
 - b. Monitor and maintain the environmental monitoring systems for surface water, ground water and air quality; and maintain and collect leachate from leachate collection system(s). Pursuant to 310 CMR 19.132, the landfill and its appurtenant equipment shall be monitored for conditions and impacts of the landfill on the environment, including impact on ground and surface water and migration of gases generated by the waste.
 - c. Take corrective actions as necessary to remediate and/or mitigate conditions that would compromise the integrity and purpose of the final cover.

3. Pursuant to 310 CMR 19.142(6), Submit to MassDEP every two (2) years a report describing any activity at the site and summarizing the results of environmental monitoring programs. Unless approved otherwise, reports shall be submitted not later than February 15th and shall cover the two (2) preceding calendar years.
4. Pursuant to 310 CMR 19.142(7), institute such additional measures as necessary for the protection of public health or safety or the environment.

The Town shall not make, nor allow, any change in use of the site except, pursuant to M.G.L. Chapter 111, §150A and 310 CMR 19.143, approval of that change in use by MassDEP. Pursuant to 310 CMR 16.21(3)(b), the site shall not be used for the conduct of solid waste handling facility unless such use meets the suitability criteria established at 310 CMR 16.40(3)(d) unless a waiver has been granted pursuant to 310 CMR 16.40(6). Pursuant to 310 CMR 16.22(2), the site shall not be used for further solid waste disposal by landfilling except pursuant to modification of the Site Assignment (“... expansions beyond the limits of an approved plan ...”) by the Concord Board of Health and a new permit by MassDEP.

NOTICE OF RIGHT TO APPEAL

The Town of Concord (the "Town") is hereby notified that it may within twenty-one (21) days file a request that this decision be deemed a provisional decision under 310 CMR 19.037(4)(b), by submitting a written statement of the basis on which the Town believes it is aggrieved, together with any supporting materials. Upon timely filing of such a request, the decision shall be deemed a provisional decision with an effective date twenty-one (21) days after the Department's receipt of the request. Such a request shall reopen the administrative record, and the Department may rescind, supplement, modify, or reaffirm its decision. Failure by the Town to exercise the right provided in this section shall constitute a waiver of the Town's right to appeal.

Appeal. Any person aggrieved by the issuance of this decision, except as provided for under 310 CMR 19.037(4)(b), may file an appeal for judicial review of said decision in accordance with the provisions of M.G.L. c. 111, s. 150A, and M.G.L. c. 30A, not later than thirty (30) days following the receipt of the final decision. The standing of a person to file an appeal and the procedures for filing such appeal shall be governed by the provisions of M.G.L. c. 30A. Unless the person requesting an appeal requests and is granted a stay of the terms and conditions of the decision by a court of competent jurisdiction, the decision shall remain effective.

Notice of Action. Any aggrieved person intending to appeal this decision to the Superior Court shall first provide notice to the Department of their intention to commence such action. Said notice of intention shall include the Department file number and shall identify with particularity the issues and reasons why it is believed

the decision was not proper. Such notice shall be provided to the Office of General Counsel of the Department and the Regional Director for the regional office which processed the application. The appropriate addresses to which to send such notices are:

General Counsel
Department of Environmental Protection
One Winter Street - 3rd Floor
Boston, MA 02108

Regional Director
Department of Environmental Protection
Northeast Regional Office
205B Lowell Street
Wilmington, MA 01887

No allegation shall be made in any judicial appeal of this decision unless the matter complained of was raised at the appropriate point in the administrative review procedures established in those regulations, provided that a matter may be raised upon a showing that it is material and that it was not reasonably possible with due diligence to have been raised during such procedures or that matter sought to be raised is of critical importance to the environmental impact of the permitted activity.

If you have any questions regarding this matter please contact David Adams at 978-694-3295.

Sincerely,

Sincerely,

This final document copy is being provided to you electronically by the Department of Environmental Protection. A signed copy of this document is on file at the DEP office listed on the letterhead.

DCA

JAC

David C. Adams

Environmental Engineer

Solid Waste Management

John A. Carrigan

Section Chief

Solid Waste Management

JAC/DCA/dca

enclosure: Fact Sheet

cc:

Concord Board of Health

141 Keyes Road

Concord, MA 01742

Duane Himes

Weston & Sampson Engineers, Inc.

5 Centennial Drive

Peabody, MA 01960-7985

MassDEP/BWP/Boston, attn: Paul Emond

Attachment 8 Quote from Mod Space to move existing transportation administration building and quote from Northeastern Petroleum for fuel tank



Concord Transportation
Concord, MA.

Jan. 9, 2012

Scope:

Remove (2) 14'x 66' modules and re set approximately 5 miles

- Remove and dispose all roofing, plywood and wood truss
- Remove skirting and decks
- Supply dumpsters
- Disconnect electrical and plumbing
- Remove gutters and canopies
- Separate buildings
- Install axle, tires and hitches (this should be with building)
- Install shipping walls and tie down

Set Up at new site

- Install footings and piers
- Set buildings
- Supply and install trusses, plywood and roofing materials
- Skirt building
- Reinstall decks
- Install gutters
- Reinstall canopies
- Connect plumbing and electrical to customer supplied services

Notes:

- No interior or exterior repairs and/or modifications are included
- Existing materials will be utilized unless noted
- If new materials are needed, the color and style to match as close as possible.

Total Budget Price \$102,500.00



Northeastern Petroleum Service and Supply Inc.
 37 Brookley Road • Jamaica Plain, MA 02130
 617-522-8390-8391-8392
 Industrial Measurement and Control Division
 617-522-6060-6061



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QUOTATION & CONTRACT FORM

To: Concord Carlisle School
 500 w
 Walden Street
 Concord, MA

No. 011011
 In reply, refer to this number.

Attention Of: Dave Anderson
 Your Inquiry: Storage Tank & Accessories

Date: 01-10-11

Gentlemen:
 We are pleased to submit quotation on our interpretation of your requirements, subject to terms and conditions printed on reverse side of this proposal.

DIESEL STORAGE TANK

QTY.	DESCRIPTION	NET TOTAL
1	Highland 10,000 gallon, above ground, horizontal, double wall, UL142, storage tank. The tank will be mild steel, the diameter 8'0", and the length will be 26'8". The exterior will include a SP 6 blast, and a urethane white topcoat. . The tank will include (6) 4", (2) 8" flanges for the emergency vents, (1) 2" monitoring pipe and (1) 24" manway and (2) tack welded 96" UL style saddles.	\$25,894.00

DIESEL TANK TOP ACCESSORIES

QTY.	DESCRIPTION	NET TOTAL
1	Morrison remote spill container with 3" ball valve, 3" check Valve, 3" adapter and cap.	\$1,404.98
1	Morrison clock gauge with 2" drop tube.	\$500.88
1	OPW 3" vent cap	\$56.00

Continued On Next Page

 PURCHASER

 DULY AUTHORIZED AGENT

Date _____

- Northeastern Petroleum Service and Supply Inc.
- Industrial Measurement and Control Div.

By Paul McMahon
Paul McMahon Sales Mgr.
 TITLE

Terms and Conditions printed on reverse side of this sheet, and any attachment hereto, constitute a part of this



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QUOTATION & CONTRACT CONTINUATION SHEET

QTY. DESCRIPTION	NET TOTAL
1 Red Jacket 1 1/2 HP submersible pump and control box	\$1887.00
1 Morrison tank top 2" ball valve	\$87.63
1 Morrison external emergency shut off valve	\$266.61
1 Morrison 2" solenoid valve (To prevent siphon of tank)	\$959.25
1 Morrison 8" emergency primary vent with gasket & bolt kit.	\$296.93
1 Morrison 8" emergency secondary vent.	\$296.93
<i>Tank Top Accessories Total.....\$5,756.21</i>	

VEEDER ROOT IN TANK LEVEL MONITORING SYSTEM

1 Veeder Root TLS300C in tank level monitoring system. The system will include the flowing:	\$5,439.00
1 – TLS300C console with built in printer	
1 – Mag Plus level probe with probe kit & 4" cap & ring kit	
1 – Interstitial leak sensor with 2" cap & ring kit	
1 – Remote hi level alarm with acknowledgement switch	
1- Start up & training	

DIESEL DISPENSERS WITH ACCESSORIES

1 Dresser Wayne, single product single hose dispenser. The dispenser will include a mechanical gallons only register. The following diesel dispenser accessories will be provide:	\$4,985.00
1- Pulse transmitter 10-1	
1-Universal hi hose retriever with hose bun	
1-1" X 25' hose	
1-OPW hi speed nozzle	
1-Breakaway with whip hose	
1-Swivel	
1-Emergency crash shutoff valve	
1 Fairfield stainless steel dispenser containment base with flex entry boot for product line and three ¾ couplings for the conduit	\$1751.00

Continued On Next Page



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QUOTATION & CONTRACT CONTINUATION SHEET

DIESEL TANK ACCESSORIES INSTALLATION

Northeastern Petroleum will perform an air test of the tank before installing any accessories. We will contact the local fire department to monitor the test. We will install the remote fill container, 3" locking ball and check valve, and connect with 3" piping to the tank top. We will install the clock gauge. The gauge float will be installed inside a 2" tube. We will install the Veeder Root level probe and interstitial leak sensor. We will install the submersible pump, 2" tank top ball valve, external emergency valve and solenoid valve. We will connect with 2" pipe from the submersible pump to the remote dispenser. We will install the dispenser base and dispenser. We will install all the dispenser accessories. We will lag down the FuelMaster pedestal. The cost for the above work including labor and materials is **\$23,152.50**

ASSUMPTIONS

We assume that a concrete pad with protective bollards for the storage tank will be provided.

We assume that a 2" pipe stub with female threads will be installed into the cement pad near where the dispenser will be installed. This is needed for the high hose retriever. We need to install a 2" X 15' pipe into the 2" pipe stub.

We assume that all storage tank permits will be provided.

We assume that the tank will be off lifted from the delivery truck by others.

We assume that the storage tank will be set on the concrete pad.

We assume that a cherry picker or fork lift truck or some type of crane will be provided to assist us in installing the submersible pump.

We assume that all electrical work including providing conduits, fittings, communication cable and wiring will be provided by others. Electrical is not included in this quote. We are available to work with the electrician to assist in making the final connections and to consult on the type of communication cable to be used and how to wire the systems. Our normal labor rates of \$79.00 per hour per man, portal to portal with a truck and travel charge of \$95.00 per day will apply. Any labor over eight hours will be billed at time and a half. We strongly recommend you use us for at least two days to assist the electrician.

See Next page For Notes



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QUOTATION & CONTRACT CONTINUATION SHEET

NOTES

- 1) Our payment terms are 30 days net from time of invoice.
- 2) Delivery is 4-5 weeks
- 3) Taxes are not included.
- 4) Freight is F.O.B. factory.
- 5) Pricing is protected for 30 days.

PRICING SUMMARY

DIESEL TANK	\$25,894.00
DIESEL TANK TOP ACCESSORIES.....	\$5,756.21
VEEDER ROOR IN TANK LEVEL MONITORING SYSTEM.....	\$5,438.00
DIESEL DISPENSER WITH ACCESSORIES.....	\$6,736.00
DIESEL TANK & ACCESSORIES INSTALLATION.....	\$23,152.50
(Less electrical)	
 GRAND TOTAL.....	 \$66,976.71

January 10, 2012

Concord/Carlisle Scholl District
Attn: Dave Anderson

Dear Dave,

This amount is for "Budget Purposes Only"

\$7,200.00.

If you have any questions, please call me.

Thank you,

Ronald Nunes
James G. Grant Co., Inc.



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QUOTATION & CONTRACT FORM

To: Concord Carlisle School
 500 w
 Walden Street
 Cncord, MA

No. 011011
 In reply, refer to this number

Attention Of: Dave Anderson
 Your Inquiry: Storage Tank & Accessories

Date: 01-10-11

Gentlemen:

We are pleased to submit quotation on our interpretation of your requirements, subject to terms and conditions printed on reverse side of this proposal.

The following FuelMaster fuel management system is a key operated system. Generally each vehicle is assigned a key. The vehicle will not be able fuel without a key. Each transaction is recorded noting the time, date, vehicle number, employee number, department and amount of fuel pumped. The key can also control the amount of fuel that is allowed for any one transaction. Nonnally we set the limit amount to match the capacity of the vehicles fuel tank.

QTY. DESCRIPTION	NET TOTAL
1 FuelMaster fuel management system. The system will include the following:	\$11,984.00
1 - FMU2500Plus master reader with pedestal	
1 - Network card	
1 - Windows software package	
1 - Key Encoder	
1 - Start up & training	

\$5,000
~~\$11,984~~
\$16,984

See Next Page For Notes

 PURCHASER

- Northeastern Petroleum Service and Supply Inc.
- Industrial Measurement and Control Div.

 DULY AUTHORIZED AGENT

By *Paul McMahon*

Date _____

Paul McMahon, Sales Manager

 TITLE

Terms and Conditions printed on reverse side of this proposal.



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QUOTATION & CONTRACT CONTINUATION SHEET

NOTES

- 1) The keys for the above system are referred to as Prokees. The price for the Prokees are \$4.20 each. Please determine how many keys are required and add that amount to above total.
- 2) Above price does not include any electrical work including conduits, communication cable, wiring, and fittings. We are available to assist your electrician with the wiring and making the final connections. I would recommend using us for at least 1-2 days. Our normal rates are \$79.00 per hour per man with a \$95.00 truck and travel charge. Any labor over eight hours will be billed at time and a half.
- 3) I quoted a network card. This will allow you to connect the FMU2500Plus reader to your network. You can then install the software package into any computer on the network. The CAT 5 or 6 cable required to connect the FuelMaster reader to your nearest network hub cannot exceed 300'. If it does other modes of communication is available, and can be quoted later.
- 4) Delivery is 3-4 weeks.
- 5) Freight is included.

Thank you for this opportunity to be of service. I look forward to meeting your needs.

ABBREVIATIONS

CPS	Concord Public Schools
CCRS	Concord-Carlisle Regional School District
FMCSA	Federal Motor Carrier Safety Administration
RMV	Registry of Motor Vehicles
DPW	Department of Public Works
TAC	Transportation Advisory Committee
CCHS	Concord Carlisle High School
PTG	Parent Teacher Group (Alcott, Thoreau, Willard, CMS)
PA	Parents Association (CCHS)
RFP	Request For Proposals
IFB	Invitation For Bid
NRC	Natural Resource Commission
DEP	Department of Environmental Protection
TSC	Transportation Safety Committee