

ACTION

Thursday, August 20, 2026 7:00 PM

Educational Services Center (ESC), 401 E. Hancock Street, Lansdale, PA 19446

1. **Opening of Meeting**
 - A. *Call to Order*
 - B. *Pledge of Allegiance*
2. **Audience of Citizens**
3. **Approval of Meeting Minutes**
4. **Committee Reports**
 - A. Finance
 - B. Safe Schools
 - C. Education/Curriculum/Instruction
 - D. Policy
 - E. Facilities & Operations
 - F. North Montco Technical Center
 - G. Montgomery County Intermediate Unit
 - H. North Penn Educational Foundation
 - I. Legislative
5. **Solicitor's Report**
6. **Superintendent's Report - Dr. Bauer - Consent Items**
 - A. Contracts
 - B. Gifts to District
 - C. Student Travel
 - D. Student Agreements & Hearing Waivers
 - E. Student Agreements
7. **Superintendent's Report - Dr. Bauer - Non Consent Items**
 - A. Personnel Agenda
8. **Finance Report**
 - A. Sanction and Approval of Invoices
 - B. Financial Report
 - C. Budget Transfers
 - D. *Treasurer's Report*
 - E. *Budget Transfers: Year End 2025-2026*
 - F. *Power School Contract for 2026-2027 School Year*
 - G. *2026-2027 Non-Union and Confidential Support Wage Increases*
 - H. *Award of Transportation Department Operational Audit RFP to Transportation Advisory Services (TAS)*
9. **Other Business**
10. **Adjournment**

ACTION

Thursday, July 23, 2026 7:00 PM Eastern

Educational Services Center (ESC)
401 E. Hancock Street
Lansdale, PA 19446

Daniel Bell:	Present
Koh Chiba:	Present
Christine Coyne:	Present
Ken Keiser:	Present
Timothy MacBain:	Present
Juliane Ramic:	Absent
Al Roesch:	Present
Kunbi Rudnick:	Present
Mark Teoh:	Present

Present: 8, Absent: 1.

1. Opening of Meeting

1.A. Call to Order

Meeting was called to order at 7:00 PM

1.B. Pledge of Allegiance

2. Audience of Citizens

William Patchel, Montgomery Township, spoke about infrastructure repairs and charter schools. Jason Lanier, Lansdale spoke about district finances and funding the new SPO, school safety program.

3. Approval of Meeting Minutes

Recommended approval of the attached meeting minutes from the June 18, 2026 Action Meeting. This motion, made by Christine Coyne and seconded by Timothy MacBain, Carried. Juliane Ramic: Absent, Daniel Bell: Yea, Koh Chiba: Yea, Christine Coyne: Yea, Ken Keiser: Yea, Timothy MacBain: Yea, Al Roesch: Yea, Kunbi Rudnick: Yea, Mark Teoh: Yea
Yea: 8, Nay: 0, Absent: 1

4. Committee Reports

4.A. Finance

4.B. Policy

4.C. Safe Schools

4.D. Education/Curriculum/Instruction (ECI)

4.E. Facilities & Operations

4.F. North Montco Technical Center

4.G. Montgomery County Intermediate Unit

4.H. *North Penn Educational Foundation*

4.I. *Legislative*

5. **Solicitor's Report**

The board met in executive session prior to tonight's meeting to discuss a confidential student matter.

6. **Superintendent's Report — Consent Items**

Recommended approval of the Consent Agenda as listed. This motion, made by Daniel Bell and seconded by Mark Teoh, Carried.

Juliane Ramic: Absent, Daniel Bell: Yea, Koh Chiba: Yea, Christine Coyne: Yea, Ken Keiser: Yea, Timothy MacBain: Yea, Al Roesch: Yea, Kunbi Rudnick: Yea, Mark Teoh: Yea
Yea: 8, Nay: 0, Absent: 1

6.A. *Adoption of Policies*

6.B. *Contracts*

6.C. *Student Agreements*

6.D. *Student Travel*

6.E. *Gifts to District*

7. **Superintendent's Report — Non Consent Items**

Prior to the start of the Non-Consent portion of the meeting, Mr. Lanier stood up in formal objection to the printed agenda provided during the meeting. Mr. Kyle Somers, Esq. noted the objection and advised that the meeting could continue.

7.A. *Personnel Agenda*

Recommend approval of personnel items as per the attached. This motion, made by Daniel Bell and seconded by Timothy MacBain, Carried.

Juliane Ramic: Absent, Daniel Bell: Yea, Koh Chiba: Yea, Christine Coyne: Yea, Ken Keiser: Yea, Timothy MacBain: Yea, Al Roesch: Yea, Kunbi Rudnick: Yea, Mark Teoh: Yea
Yea: 8, Nay: 0, Absent: 1

7.B. *Memorandum of Agreement with NPEA*

Recommend approval of the Memorandum of Agreement (MOA) with the North Penn Education Association (NPEA), as per the attached. This motion, made by Timothy MacBain and seconded by Ken Keiser, Carried.

Juliane Ramic: Absent, Daniel Bell: Yea, Koh Chiba: Yea, Christine Coyne: Yea, Ken Keiser: Yea, Timothy MacBain: Yea, Al Roesch: Yea, Kunbi Rudnick: Yea, Mark Teoh: Yea
Yea: 8, Nay: 0, Absent: 1

7.C. *2026-27 Physical Education Supplies Bid Award*

Recommend approval of the 2026-27 Physical Education Supplies in the amount of \$5,650.96 to the vendors listed in the attached bid tabulations. This motion, made by Daniel Bell and seconded by Timothy MacBain, Carried.

Juliane Ramic: Absent, Daniel Bell: Yea, Koh Chiba: Yea, Christine Coyne: Yea, Ken Keiser: Yea, Timothy MacBain: Yea, Al Roesch: Yea, Kunbi Rudnick: Yea, Mark Teoh: Yea
Yea: 8, Nay: 0, Absent: 1

7.D. Bid Pack -1 GC Proposed Change Order #7

Recommend approval of BP-1 GC Proposed Change Order #7. This motion, made by Daniel Bell and seconded by Ken Keiser, Carried.

Juliane Ramic: Absent, Daniel Bell: Yea, Koh Chiba: Yea, Christine Coyne: Yea, Ken Keiser: Yea, Timothy MacBain: Yea, Al Roesch: Yea, Kunbi Rudnick: Yea, Mark Teoh: Yea
Yea: 8, Nay: 0, Absent: 1

7.E. Bid Pack-2 GC Proposed Change Order #4

Recommend approval of Bid Pack-2 GC Proposed Change Order #4. This motion, made by Ken Keiser and seconded by Daniel Bell, Carried.

Juliane Ramic: Absent, Daniel Bell: Yea, Koh Chiba: Yea, Christine Coyne: Yea, Ken Keiser: Yea, Timothy MacBain: Yea, Al Roesch: Yea, Kunbi Rudnick: Yea, Mark Teoh: Yea
Yea: 8, Nay: 0, Absent: 1

7.F. Fire Alarm Systems Maintenance Service Contract

Recommend approval for Fire Alarm Systems Maintenance Service Contract to Parkside Fire and Security for a one-year contract with an option for renewal for up to two additional years. This motion, made by Timothy MacBain and seconded by Koh Chiba, Carried.

Juliane Ramic: Absent, Daniel Bell: Yea, Koh Chiba: Yea, Christine Coyne: Yea, Ken Keiser: Yea, Timothy MacBain: Yea, Al Roesch: Yea, Kunbi Rudnick: Yea, Mark Teoh: Yea
Yea: 8, Nay: 0, Absent: 1

7.G. Emergency Generator Preventative Maintenance Contract

Recommend approval for Emergency Generator Preventative Maintenance Contract. This motion, made by Daniel Bell and seconded by Christine Coyne, Carried.

Juliane Ramic: Absent, Daniel Bell: Yea, Koh Chiba: Yea, Christine Coyne: Yea, Ken Keiser: Yea, Timothy MacBain: Yea, Al Roesch: Yea, Kunbi Rudnick: Yea, Mark Teoh: Yea
Yea: 8, Nay: 0, Absent: 1

7.H. Contract for HS Library Book Moving and Climate Controlled Storage

Recommend approval of the contract for HS Library Book Moving and Climate Controlled Storage. This motion, made by Timothy MacBain and seconded by Daniel Bell, Carried.

Juliane Ramic: Absent, Daniel Bell: Yea, Koh Chiba: Yea, Christine Coyne: Yea, Ken Keiser: Yea, Timothy MacBain: Yea, Al Roesch: Yea, Kunbi Rudnick: Yea, Mark Teoh: Yea
Yea: 8, Nay: 0, Absent: 1

7.I. Items for auction on Municibid

Request approval to place outdated or unused items for auction on Municibid. This motion, made by Mark Teoh and seconded by Christine Coyne, Carried.

Juliane Ramic: Absent, Daniel Bell: Yea, Koh Chiba: Yea, Christine Coyne: Yea, Ken Keiser: Yea, Timothy MacBain: Yea, Al Roesch: Yea, Kunbi Rudnick: Yea, Mark Teoh: Yea
Yea: 8, Nay: 0, Absent: 1

7.J. Appointment of Interim Treasurer

Recommend approval of Mary White, Assistant Business Administrator, be appointed as Interim Board Treasurer effective 7/24/2026. This motion, made by Daniel Bell and seconded by Ken Keiser, Carried.

Juliane Ramic: Absent, Daniel Bell: Yea, Koh Chiba: Yea, Christine Coyne: Yea, Ken Keiser:

Yea, Timothy MacBain: Yea, Al Roesch: Yea, Kunbi Rudnick: Yea, Mark Teoh: Yea
Yea: 8, Nay: 0, Absent: 1

8. Finance Report — Consent Items

Recommend approval of the Finance Report listed below and the attachments. This motion, made by Timothy MacBain and seconded by Koh Chiba, Carried.

Juliane Ramic: Absent, Daniel Bell: Yea, Koh Chiba: Yea, Christine Coyne: Yea, Ken Keiser: Yea, Timothy MacBain: Yea, Al Roesch: Yea, Kunbi Rudnick: Yea, Mark Teoh: Yea
Yea: 8, Nay: 0, Absent: 1

8.A. Treasurer's Report

8.B. Sanction and Approval of Invoices

8.C. Financial Report

8.D. Budget Transfers

8.E. Assessment Appeals

Recommend approval of the listed stipulations, as per attached. This motion, made by Christine Coyne and seconded by Daniel Bell, Carried.

Juliane Ramic: Absent, Daniel Bell: Yea, Koh Chiba: Yea, Christine Coyne: Yea, Ken Keiser: Yea, Timothy MacBain: Yea, Al Roesch: Yea, Kunbi Rudnick: Yea, Mark Teoh: Yea
Yea: 8, Nay: 0, Absent: 1

8.E.1. Stipulation for approval concerning VV900 LLC, parcel# 53-00-03056-00-5 located at 900 Forty Foot Road.

Motion to pass 8E1. This motion, made by Christine Coyne and seconded by Daniel Bell, Carried.

Juliane Ramic: Absent, Daniel Bell: Yea, Koh Chiba: Yea, Christine Coyne: Yea, Ken Keiser: Yea, Timothy MacBain: Yea, Al Roesch: Yea, Kunbi Rudnick: Yea, Mark Teoh: Yea
Yea: 8, Nay: 0, Absent: 1

8.E.2. Stipulation with Welsh Road Retail LP, concerning the property located at 277 DeKalb Pike.

Motion to pass 8 E2. This motion, made by Christine Coyne and seconded by Ken Keiser, Carried.

Juliane Ramic: Absent, Daniel Bell: Yea, Koh Chiba: Yea, Christine Coyne: Yea, Ken Keiser: Yea, Timothy MacBain: Yea, Al Roesch: Yea, Kunbi Rudnick: Yea, Mark Teoh: Yea
Yea: 8, Nay: 0, Absent: 1

9. Other Business

10. Adjournment

Motion to adjourn. This motion, made by Kunbi Rudnick and seconded by Daniel Bell, Carried.

Juliane Ramic: Absent, Daniel Bell: Yea, Koh Chiba: Yea, Christine Coyne: Yea, Ken Keiser: Yea, Timothy MacBain: Yea, Al Roesch: Yea, Kunbi Rudnick: Yea, Mark Teoh: Yea
Yea: 8, Nay: 0, Absent: 1
Meeting ended at 7:45 PM

WORK SESSION

Tuesday, August 4, 2026 7:00 PM Eastern

Educational Services Center (ESC)
401 E. Hancock Street
Lansdale, PA 19446

Daniel Bell:	Present
Koh Chiba:	Present
Christine Coyne:	Present
Ken Keiser:	Present
Timothy MacBain:	Present
Juliane Ramic:	Present
Al Roesch:	Present
Kunbi Rudnick:	Absent
Mark Teoh:	Present

Present: 8, Absent: 1.

1. Opening of Meeting

1.A. Call to Order

1.B. Pledge of Allegiance

2. Audience of Citizens

Jason Lanier, Lansdale spoke about the money that was being spent. He mentioned the High School Project, Housing Development, SPOs and onboarding, Health Care Center as items that are not education-focused.

3. Superintendent's Report - Non Consent Items

3.A. Personnel Agenda

Recommend approval of personnel items as per the attached. This motion, made by Daniel Bell and seconded by Christine Coyne, Carried.

Kunbi Rudnick: Absent, Daniel Bell: Yea, Koh Chiba: Yea, Christine Coyne: Yea, Ken Keiser: Yea, Timothy MacBain: Yea, Julianne Ramic: Yea, Al Roesch: Yea, Mark Teoh: Yea
Yea: 8, Nay: 0, Absent: 1

3.B. Student Agreements

Recommend approval of Student Agreements as per those listed and copies are on file in the Office of Special Education. This motion, made by Timothy MacBain and seconded by Ken Keiser, Carried.

Kunbi Rudnick: Absent, Daniel Bell: Yea, Koh Chiba: Yea, Christine Coyne: Yea, Ken Keiser: Yea, Timothy MacBain: Yea, Julianne Ramic: Yea, Al Roesch: Yea, Mark Teoh: Yea
Yea: 8, Nay: 0, Absent: 1

3.C. Fall 2026/Winter 2027: Community Education Classes & Fees

Recommended approval of Fall 2026/Winter 2027 Community Education Programs & Fees, per the attached. This motion, made by Christine Coyne and seconded by Ken Keiser, Carried.
Kunbi Rudnick: Absent, Daniel Bell: Yea, Koh Chiba: Yea, Christine Coyne: Yea, Ken

Keiser: Yea, Timothy MacBain: Yea, Juliane Ramic: Yea, Al Roesch: Yea, Mark Teoh: Yea
Yea: 8, Nay: 0, Absent: 1

3.D. PA Department of Community and Economic Development Public School Facility Improvement Program Grant

Recommended approval to submit the PA Department of Community and Economic Development Public School Facility Improvement Program Grant as per the attached resolution. This motion, made by Ken Keiser and seconded by Daniel Bell, Carried.

Kunbi Rudnick: Absent, Daniel Bell: Yea, Koh Chiba: Yea, Christine Coyne: Yea, Ken Keiser: Yea, Timothy MacBain: Yea, Juliane Ramic: Yea, Al Roesch: Yea, Mark Teoh: Yea
Yea: 8, Nay: 0, Absent: 1

4. **Other Business**

Dr. Bauer shared that local students will be presenting to

5. **Adjournment**

NORTH PENN SCHOOL DISTRICT

TREASURER'S REPORT

The monthly meeting of the Board of School Directors of the North Penn School District was held at The Educational Service Center, 401 E Hancock Street, Lansdale, PA 19446 -August 4, 2026

Financial Reports for the month of June, 2026 were given.

BALANCE AND INVESTMENT JULY 1, 2025 INCLUDING PETTY CASH	\$	117,548,874.31
CASH RECEIPTS June	\$	18,652,387.04
CASH RECEIPTS YTD		350,596,425.23
CASH DISBURSEMENTS FOR June	\$	44,014,727.98
CASH DISBURSEMENTS YTD		350,593,137.88
TOTAL AVAILABLE FUNDS	\$	117,552,161.66
CERTIFICATES OF DEPOSIT	\$	747,000.00
PAYROLL		-
PETTY CASH		-
WAGE ATTACHMENT ACCOUNT		-
CASH WITH FISCAL AGENTS		-
ESCROW ACCOUNT FOR TAXES PAID IN PROTEST		1,587,678.11
NON-INTEREST BEARING CHECKING/SAVINGS ACCOUNTS		2,000,000.00
INTEREST BEARING CHECKING/SAVINGS ACCOUNTS		113,217,483.55
TOTAL INVESTMENTS AS OF JUNE 30, 2026	\$	117,552,161.66



PowerSchool Group LLC
150 Parkshore Dr.
Folsom CA 95630

Quote #: Q-872990-2
Quote Expiration Date: 23-JUL-2026

Sales Quote - This Is Not An Invoice

Prepared By: Joel Hill
Customer Name: North Penn School District
Enrollment:
Contract Term: 12 Months
Start Date: July 1, 2026
End Date: June 30, 2027
Payment Terms: Net 30

Customer Contact: Tara Houser
Title: CFO
Address: 401 E HANCOCK ST
City: Lansdale
State/Province: Pennsylvania
Zip Code: 19446
Phone #: (215)368-0400
Pricing Vehicle Contract #:

Contract Term : July 1, 2026 to June 30, 2027

Quote Summary

License and Subscription Period(s)	License and Subscription	Implementation/ Training	Total
Subscription Period 1: July 1, 2026 to June 30, 2027	USD 186,339.82	USD 0.00	USD 186,339.82
Total Contract : July 1, 2026 to June 30, 2027	USD 186,339.82	USD 0.00	USD 186,339.82

Period 1 : July 1, 2026 to June 30, 2027

License and Subscription Fees

Product Description	Quantity	Initial Qty	Unit	Price
ERP Application Managed Services - eFinancePlus	1.00	0	Year	USD 83,859.82
eFinancePlus Core Subscription	12,810.00	0	Students	USD 102,480.00
New License and Subscription Fees : USD 186,339.82				
eFinancePlus MKS SysAdmin Toolkit M/S	0.00	1	Year	USD -1,281.48
eFinancePlus Personnel Budgeting M/S	0.00	1	Students	USD -3,578.51
eFinancePlus Aesop Interface M/S	0.00	1	Students	USD -2,158.53
eFinancePlus Fixed Assets M/S	0.00	1	Students	USD -5,721.00
eFinancePlus Batch Timecard Interface M/S	0.00	1	Students	USD -4,039.28
eFinancePlus Employee Access Center M/S	0.00	1	Students	USD -3,941.12
eFinancePlus Module Software M/S	0.00	1	Year	USD -11,953.21
eFinancePlus Employee Benefits M/S	0.00	1	Students	USD -4,444.12
Analytics eFinancePlus M/S	0.00	1	Students	USD -5,993.51
eFinancePlus Misc Billing M/S	0.00	1	Students	USD -5,336.45
Unified Admin eFinancePlus Four J's System Software	0.00	1	Year	USD -2,335.78
eFinancePlus Fixed Assets Communicator M/S	0.00	1	Students	USD -1,091.62
eFinancePlus Financial Acctg Base M/S	0.00	1	Students	USD -13,122.66
eFinancePlus Human Resources Base M/S	0.00	1	Students	USD -23,252.09
eFinancePlus Position Control M/S	0.00	1	Students	USD -3,471.13
eFinancePlus Employee Access Center M/S	0.00	1	Students	USD -4,589.79
Unified Admin eFinancePlus Four J's System Software	0.00	1	Year	USD -13,155.04
Unified Admin eFinancePlus Four J's System Software	0.00	1	Year	USD -874.50

Sub-total credits : USD -110,339.82*

New Term 1 Total Fees : USD 186,339.82

Total Contract Amount: : USD 186,339.82

Total Contract Amount: : USD 186,339.82

Estimated Annual Ongoing Fees as of July 1, 2027 - Fees subject to an annual uplift, which will be reflected on a renewal quote

License and Subscription Fees

Product Description	Quantity	Initial Qty	Unit	Price
ERP Application Managed Services - eFinancePlus	1.00	0	Year	USD 83,859.82
eFinancePlus Core Subscription	12,810.00	0	Students	USD 102,480.00
License and Subscription Fees : USD 186,339.82				

Subscription Start and End Dates shall be as set forth above. The Start Date may be delayed based upon the date that PowerSchool receives this executed quote or Customer's purchase order if one is needed. On-Going PowerSchool Subscription/Maintenance and Support Fees are invoiced at the then-current rates and enrollment per existing terms of the executed agreement between Customer and PowerSchool. Any applicable sales or other tax has not been added to this quote. If this quote includes promotional pricing, such promotional pricing may not be valid for the entire duration of this quote. All invoices shall be sent to Customer upon or promptly after execution of this quote, unless otherwise set forth in the applicable statement of work or executed agreement between the parties (e.g., services billed on time and material basis will be invoiced when such services are incurred).

All purchase orders must include the exact quote number of this quote. Customer agrees that purchase orders are for administrative purposes only and do not impact the terms or conditions of this quote or any agreement executed between the parties. Any credit provided by PowerSchool is nonrefundable and must be used within 12 months of issuance. Unused credits will expire after 12 months.

If Customer pays in advance for any professional services, all professional services must be scheduled and delivered within twelve (12) months of the applicable quote start date, unless otherwise agreed in writing by PowerSchool; any portion of any prepaid amount for professional services that has not been used within such twelve (12) month period will be forfeited.

This quote incorporates any statement of work attached hereto. By execution of this quote, or its incorporation, this and future purchases of subscriptions or services from PowerSchool are subject to and incorporate the terms and conditions found at: https://www.powerschool.com/MSA_2024

By either (i) executing this quote or (ii) accessing the services described on this quote, Customer agrees that after the contract term of this quote, the subscription for such services will continue for successive twelve (12) month subscription periods on the same terms and conditions as set forth herein, subject to a standard annual price uplift, unless Customer provides PowerSchool with a written notice of its intent not to renew at least sixty (60) days prior to the end of the applicable current contract term.

THE PARTIES BELOW ACKNOWLEDGE THAT THEY HAVE READ THE AGREEMENT, UNDERSTAND IT AND AGREE TO BE BOUND BY ITS TERMS.

POWERSCHOOL GROUP LLC
Signature:



North Penn School District
Signature:

Printed Name: Jon Scrimshaw

Printed Name:

Title: Chief Accounting Officer

Title:

Date: 25-JUN-2026

Date:

*****Sales Quote - This Is Not an Invoice*****

** Any credits shown for the Product(s) or Service(s) listed above are only applicable if i) the Customer has been invoiced by PowerSchool and ii) the invoice has been paid prior to the issuance of this Quote. Credits listed for future amounts that have not yet been invoiced and paid (ex: Year 2 of a 3-year term) will not be applied and instead are displayed here solely to reflect the amount/ quantity reduced from your original contract for those future terms. Please reach out to your PowerSchool representative for any questions on the amounts owed.**



eFinancePlus Managed Services Statement of Work



PowerSchool

 Personalized Education
for Every Journey

Service: eFinancePlus Application Managed Service

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Updated February 16, 2025

Document Owner: ERP Professional Services

This edition applies to Release 23.10 of the ERP software and all subsequent releases and modifications until otherwise indicated in new editions or updates.

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Copyright © 2025 PowerSchool its affiliates. All rights reserved. All trademarks are either owned or licensed by PowerSchool or its affiliates. Other brands and names are the property of their respective owners.

This Statement of Work (“SOW”) for Professional Services is entered into and between **PowerSchool Group LLC (“PowerSchool”)** and **Customer**. This SOW is not a software subscription agreement, nor does it provide Customer with licenses to any PowerSchool application which requires a separately executed Master Services Agreement (“MSA”) and PowerSchool Quote. This SOW is issued pursuant to the Professional Services terms and conditions incorporated into the MSA entered by and between PowerSchool and Customer.

“**Project**” refers to the scope of services, including the performance of all work, activities, and deliverables, set forth in this SOW. Appendices are hereby included in this SOW. Notwithstanding any other provision of these terms, the timeline contained in this SOW shall be regarded only as an estimate.

“**Professional Services**” as used herein means Professional Services work rendered by PowerSchool in relation to this SOW. It is distinguished from the meaning of “Service” as used in the MSA.

1. SCOPE OF WORK

This section defines the scope of the Professional Services to be delivered by PowerSchool with support from Customer resources under this SOW. If changes or expanded scope are necessary, the parties shall follow the **Project Change Request (“PCR”)** procedure. Upon investigation of changes, the SOW may result in modifications to the Estimated Schedule, Fees, or other terms of this SOW. PCR terms are defined in section 6.

1.2 Understanding of Objectives

The purpose of this SOW is to outline and specify the services and support provided by PowerSchool Professional Services in the fulfillment of the Application Management Service (“AMS”) and address the roles and responsibilities of PowerSchool and the school, district, or other entity subscribing to AMS.

AMS is a comprehensive solution that manages and maintains the Customer’s Enterprise Resource Program (ERP) in the following areas:

- Kick-off and Communication Planning
- Software Best Practices
- Support Case and Enhancement Requests
- Compliance/State Reporting Guidance
- Annual and Cyclical Activities
- Business Practice Optimization
- Application Upgrade Support
- Dashboards and Standard Reporting
- How To Questions

1.3 Organizational Information

The following organizations are in scope:

- 1 Organization
- 1 Language (English)
- 1 Currency (USD)

The Project will be executed through the following mediums:

- Remote Services
 - All services will be rendered through secure remote access or web-based meetings.

1.4 Location

The Project will be located at the following locations:

- Remote
- Onsite (by customer requests only and agreed upon by AMS Advisor, travel expenses billed as incurred)

1.5 ERP Applications

The following PowerSchool software application(s) and subsequent modules will be part of the Services outlined in this statement of work.

- ☐ PowerSchool ERP
- ☒ eFinancePlus
- ☐ Atrieve
- ☒ Applicant Tracking Integration
- ☒ Records Integration
- ☒ SmartFind Express Integration

1.6 Customer Environments

The following PowerSchool software application(s) and subsequent modules will be part of the Services outlined in this statement of work.

- ☒ Hosted
- ☐ On Premise

1.7 Hardware/Network Support

The management, maintenance, troubleshooting, etc. of the district's on-premises servers that house the applications for this statement of work are NOT included in this SOW. This also excludes Customer created SQL scripts, ODBC manipulation, server automation routines, secure file transfer protocols (SFTP) outside of the application, operating system upgrades and windows server maintenance.

1.8 AMS Advisor On-Premise Access

The district agrees to provide full and secure access to the application and database for the AMS Advisor to perform and render services promptly. PowerSchool provides tools and strategies for secure access that allows access and permissions to be controlled by the customer.

1.9 Roles & Ownership

The bullets below outline the roles, responsibilities, and ownership for this agreement.

- **AMS Manager:** Manage the priorities/activities & interactions for each client.
- **AMS Advisor:** Completing assignments defined by the PM, including all consulting sessions/BPR. Provide guidance to district on ERP system as needed.
- **District AMS Contact:** Responsible for managing the ERP system to include but not limited to financial operations, employee information, benefits, attendance, and payroll. Manage district resources & complete required tasks assigned by PS including creating support cases to be opened under advisement of the ERP AMS team.

2. SCOPE OF SERVICE

A PowerSchool AMS Manager & Advisor will be assigned to the district. The AMS Manager will be the Customer's primary point of contact for activities identified in this statement of work. The following activities included in this service:

2.2 Kickoff & Communication Plan

- Schedule meeting(s) to discuss roll-out of AMS activities and scheduling.
- Identify communication plans for leadership and staff.
- Develop and provide access to project reporting collateral.
- Establish status meeting cadence for Customer and PowerSchool management teams.

2.3 Business Process Optimization

A key component of the AMS offering is to provide continuous process improvement activities during the term of this SOW. Services provided will include:

1. Business Process Review (BPR) – a formal and comprehensive review of the Customer's current ERP business practices and includes:
 - 1.1. One (1) Business Process Review is included in the term of this Statement of Work.
 - 1.2. Customer and AMS Manager to identify time and scheduling for BPR activities.
 - 1.3. Customer to inform and identify staff to participate in the workshops.
 - 1.4. PowerSchool will complete the following:
 - 1.4.1. Staff Survey and report
 - 1.4.2. Workshops that cover Finance/Budget, Purchasing, Personnel/Applicant, Payroll/Timesheet, and IT/Technical.
 - 1.4.3. A final report that includes summary overview and recommendations.

Exclusion(s):

- Business process review recommendations for consulting and training activities are not included as part of AMS.
- Implementation of new modules.

2. Advisement and planning activities for released system enhancements. This can include testing procedures, checklists, consultation, and other support.
3. Establishment of regularly scheduled "Open Office Hours" to provide guidance on application configuration and processes, forms, workflows, and "how-to" questions for modules currently used.
 - Customer and AMS Manager to coordinate meeting cadence.
 - AMS Manager to schedule sessions.
 - Customer to identify process and staff to participate in sessions.
 - AMS Advisor to provide troubleshooting and resolution expertise.
 - AMS Advisor, at their discretion, may include an Application Consultant to assist with sessions.
 - Upon completion of training activities for new module implementation (see Exclusions), module(s) will be covered under this SOW.
 - AMS Advisor will provide an email address to the client.
 - Customer will determine which staff will have access to AMS Advisor email address.

Exclusions:

- Training for module(s) not currently used by Customer at the time of the signing of this SOW.
- Refresher training activities for new hires or existing staff.
- Staff augmentation activities – performing duties handled by district staff.
- Implementations projects are not included in this SOW.
- CSAT or escalations directly related to an ongoing implementation

2.4 Support Cases & Enhancements

Proper management of support case priorities, issue identification, and enhancement requests is critical to customer operations. Services provided will include:

- AMS Manager will act as a "first point of contact" for potential issues prior to Customer staff submitting support case(s).
 - AMS Manager will inform the Customer to submit a support case, if needed.
 - The Customer is responsible for submitting the case to ensure proper communication channels are followed to resolve the issue and case will indicate previous communication with AMS Advisor.
- The AMS Advisor will advocate, communicate, prioritize, and assist with communications between the Customer and PowerSchool support staff for all open support case activities.
- The AMS Advisor will provide regular updates on open support case status.
- The AMS Advisor will provide guidance to the Customer for submission of product enhancement requests.

Exclusion(s):

- Active support cases will not be resolved by the AMS Advisor. This will be handled by the PowerSchool Support team.

2.5 Release Upgrade Support

To stay current on major feature releases and ensure that Customer complies with PowerSchool's N-1 policy for software versioning and support. Services to be provided:

- The AMS Manager and Customer will identify time and scheduling for upgrade activities.
- Customer to inform and identify staff to participate in the upgrade activities.
- Tasks to be completed for the upgrade:
 - Project Plan and management of upgrade tasks.
 - Test environment setup.
 - Support of testing activities.
 - Production turnover activities including production updates and overview sessions.

Exclusion(s):

- Costs for custom retrofits created by PowerSchool for the Customer.
- Costs for custom retrofits and support for Customer created and implemented customizations (SQL, APIs, code modification, etc.).
- Technical services not within scope of SaaS (Software as a Service) or hosting MSA agreements.

2.6 Cognos Dashboards & Reporting

Accessing and understanding a Customer's business data is critical to understanding an organization's business health and operational efficiencies. PowerSchool AMS will provide reporting and dashboard services as part of the Application Managed Service.

- Installation of Cognos Dashboards and Report package (if not previously installed).
 - Includes Persona-based dashboards for Superintendent, Chief Financial Officer, Purchasing Director, Human Resources Director, and Payroll Manager
 - Includes reports for Accounting, Budget, Purchasing, Human Resources, and Payroll.
- Customer and AMS Manager to identify time and scheduling for installation activities.
- Customer and AMS Advisor to identify requirements for updates to dashboards and reports.

Exclusion(s):

- Customer-specific Cognos report development
- Signatory of compliance data accuracy.
- Creation of new state reports by the AMS team.

2.7 Compliance & State Reporting

Partner with client on having a quarterly state compliance meeting.

Exclusion(s):

- Submission of annual, quarterly, and monthly federal, state, and local compliance reports.
- Signatory of compliance data accuracy.

2.8 Seasonal & Cyclical Training

Online access to materials to support the Customer with proper management of system data and software processes that typically occur on an annual cycle will be provided.

- AMS Advisor will provide access to the online materials.
- Application consultants will provide office hours to support the online materials and questions from the Customer's staff.

Exclusion(s):

- Customer Education Exclusive/Monthly Training Seminars Offerings
- Customer Education for 1:1 Training requests
- Customer Education Training Bootcamps

3. HOW TO CONTACT APPLICATION MANAGED SERVICES

AMS has established a process for AMS Customers to use to ensure a timely response to AMS support and service requests. When the Customer contacts PowerSchool AMS, an AMS Representative, AMS Advisor or Technical Specialist will be assigned to assist the Customer with the request. The AMS representative will have access to documentation capturing the technical information related to the Customer's ERP environment and an archive of previous AMS support issues and requests.

The two primary methods for requesting service or support are indicated below. AMS provides a 24hour Service Level Agreement for responding to correspondence directed to either of the following:

Email

To receive support or request services by email, the Customer should direct their requests to your AMS Advisor directly.

Telephone

To receive support or request services by telephone, the Customer may contact their AMS Advisor directly during normal business hours.

4. CUSTOMER ESCALATION PROCEDURE**4.2 Escalation**

If Professional Services cannot provide resolution or indicate the appropriate path to resolution within two (2) business days from receipt of the request, the Customer's Primary Contact can contact Professional Services management directly at amsmanagement@powerschool.com via email with the details of the situation and desired escalation.

5. EXPENSES**5.2 Onsite Travel Expenses**

Customer choosing to engage in onsite engagements will be invoiced separately for travel expenses incurred monthly. Payment is due 30 days from invoice. Invoices will be sent to the Customer via electronic mail. Travel expenses are not included in the hourly rate, unless specifically stated within the statement of work.

6. PROJECT CHANGE REQUESTS

The following process will be followed in cases of change to Project scope, budget, or timeline:

- A **Project Change Request ("PCR")** form will be the vehicle for communicating change. The PCR must describe the change, the rationale for the change, and the effect the change will have on the Project.
- The designated Project Manager of the requesting party will submit the request to the other party.
- All Project Managers will review the proposed change and approve it or reject it.
- The PowerSchool Project Manager and Client Project manager must sign a PCR form to authorize implementation and invoicing of the changes.

The following is an example template:

6.2 Sample PCR Template

Customer Name:	Date Requested:
Change Order #:	PowerSchool EM:
Project Name:	Project Sponsor:

Change Order Value:		Billing Type:
Estimated Fees:	\$	
Estimated Expenses:	\$	Type of Change:
Estimated Total:	\$	Scope? Schedule? Both?

Hourly Rate:

The Professional Services will be delivered on a Time & Materials basis. Customer will be billed \$xxx per hour starting with the first monthly invoice and up to a maximum of xxx hours. Any additional hours will require a new Change Order.

Description of Change Requested:**Reason for Change:****Proposed Approach to Resolve:**

Impact on Scope	Impact on Proposed Changes:
Impact on Scope Risk	
Impact on Schedule	
Approvals to Proceed:	
Customer:	PowerSchool Corporation
Signature:	Signature:
Date:	Date:

7. GENERAL ASSUMPTIONS

The following procedures will be followed for the performance of this SOW.

1. If onsite engagements occur, PowerSchool will have space to work at the Customer offices as required during this strategic project.
2. All Customer personnel who need to be involved in this project will be sufficiently knowledgeable about their business area's needs and have the authority to represent their business area.
3. All Customer personnel who need to be involved in this project will be available and responsive in a timely manner, so as not to delay the project's schedule.
4. Unless otherwise noted or specifically identified within the contract, all customizations, enhancements, forms, reports, etc. not contained within the base package are considered out of scope and will follow the Project Change Control Procedure.
5. All sign offs must be done by an employee and designated signatory of the Customer. Third-party entities engaged by the Customer are not acceptable signatories for any project sign offs.

6. Customers will provide PowerSchool with remote access to the system for AMS Services, as required.
7. The PowerSchool AMS Advisor will point the Customer to available procedures, guidelines, standards, reference materials and system/application documentation.



**North Penn School District Transportation
Department Operational Audit — Proposal**

Transportation Advisory Services *Transportation
Proposal*

Submitted by Brian Lafountain, CPA blafountain@TransportationConsultants.com

July 8, 2026

171 Sully's Trail, Pittsford, NY 14534 | transportationconsultants.com | 800.233.3251

Rebecca Livsey, Procurement Supervisor

North Penn School District

401 East Hancock Street

Lansdale, PA 19446

Via email: npprocure@npenn.org

Copy: Dennis Ryan, Coordinator of Transportation — ryands@npenn.org

Re: Request for Proposals — Transportation Department Operational Audit

Dear Ms. Livsey:

Thank you for the opportunity to submit the enclosed proposal to provide a comprehensive Transportation Department Operational Audit for the North Penn School District (hereinafter NPSD or the District).

We believe that **TAS** is uniquely qualified to offer these services to the District. Over the past 36 years we have conducted numerous transportation studies focused on generating operating efficiencies, enhancing services, and exploring program options for districts of every size and structure. We are dedicated to serving the school district marketplace — we do not work for contractors; we do not sell products or services; we do not spread our focus to other areas such as public-sector fleets; and we do not accept fees or commissions. This independence is critical for NPSD given the strategic RFP assistance component of this engagement, where any perceived vendor bias could compromise the integrity of the future contracted-services procurement.

TAS offers NPSD unmatched depth in the exact scope areas contemplated by this RFP — including fleet and equipment audits, garage and facility utilization reviews, workforce and staffing analysis, technology lifecycle planning (Transfinder, Bus Hive, Bus Conduct, GPS, on-board cameras, tablets, and ASBE), three-year expenditure and benchmarking reviews, strategic RFP drafting for contracted services, demographic and feasibility modeling, and long-term capital forecasting. Our consultants have delivered these services to more than 550 districts, agencies, and associations across 22 states, including comparable large-scale districts.

The **TAS** approach is one based on providing pragmatic recommendations for services that will work. We do not burden you with meaningless graphs and sizzle. We provide the District with ideas and suggestions that have real-world applications and that are consistent with good transportation practices. As we interface with the District, you will find that we know what makes a good transportation program, and we know how to implement changes that are workable for all parties — including the practical realities of a district that transports approximately 13,000 students daily,

operates in-house with a fleet, maintenance shop, and propane fueling infrastructure, and is now planning the 2028-2029 contracted-services procurement.

We stand ready to discuss our proposal, and we would welcome an opportunity to make any adjustments that may be necessary if we have misinterpreted your needs and interests. As you evaluate our submission, please feel free to contact any of our 550+ current or former clients — we are very proud of our past efforts.

All of us at **TAS** look forward to working with the District on this challenging and important engagement.

Sincerely,

A handwritten signature in cursive script, reading "Brian Lafountain". The signature is written in a dark ink and is positioned below the word "Sincerely,".

Brian Lafountain, CPA, CFE President

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Proposal Summary

Transportation Advisory Services (**TAS**) is pleased to provide this proposal to the North Penn School District (NPSD) in response to the District's *Request for Proposals — Transportation Department Operational Audit*, released June 10, 2026. We understand that NPSD seeks a qualified consulting firm to perform a comprehensive operational audit of the District's Transportation Department, with the objectives of evaluating current efficiencies, infrastructure, and technology utilization, and providing strategic assistance for future contracted service requirements — specifically the 2028-2029 contracted bus services RFP, which is anticipated to begin drafting in Spring 2027.

TAS offers the District proven expertise in the evaluation of student transportation services. We have detailed knowledge of both district-operated and contracted programs; we offer a dedicated staff without the risk of any conflicts of interest; and we are recognized industry leaders with a level of professionalism that is a "must" to assist in the implementation of recommendations. We are the **only** consulting firm that offers NPSD 36 years of dedicated student transportation services focused exclusively on working for our public-sector clients — with a demonstrated track record in large in-house programs, propane-fueled fleets, ASBE deployment, and multi-vendor contracted-service procurement.

We stand ready to discuss this proposal, and our recommended process, to meet the objectives of the District. **TAS** has a reputation for effective and focused student transportation consulting services. We look forward to putting our proven services to work for the North Penn School District.

PART I – Management and Qualifications

A. Credentials and Qualifications in Transportation Consulting

Transportation Advisory Services (**TAS**) was founded in 1987 in New York State by Mark Walsh and Christopher Andrews. From its inception, **TAS** was dedicated to working with school districts, associations, agencies, and universities to provide a variety of transportation consulting services. *Based on our philosophy of providing independent, third-party expertise void of any concerns about conflicts of interest, TAS has not accepted any engagements from any contractors, and does not market products or services that generate any income or fees from other entities.*

As **TAS'** reputation grew in the industry, our services expanded. As shown on the client listing included with our supporting materials, **TAS** has now provided services to **more than 550 districts, agencies, and associations in 22 states**. This multi-state experience includes efficiency studies of district-operated programs; focused reviews on the pros and cons of contracted services; bid process management (directly relevant to Section 2.6 of NPSD's RFP); targeted services including program troubleshooting; routing, tiering and bell time reviews; facility utilization and design options; and State-funded programs for shared services and transportation program evaluations.

Directly Relevant Comparable Engagements:

- Fayetteville-Manlius Central School District (in-house fleet operations and contracted-service benchmarking)
- Schenectady City School District (urban, multi-tier, contracted vendor model — comprehensive efficiency study)
- Pittsford CSD, West Irondequoit CSD (in-house fleet operations and contracted-service benchmarking)
- Providence Public School District, Valley Central, Batavia, Newfane, Auburn CSD (Transportation RFP / Bid Management Services — directly parallel to NPSD's Section 2.6 scope)
- Matanuska-Susitna Borough SD (large multi-region district — comparable size complexity)

B. Experience and References

Brian Lafountain, the current President of **TAS**, and **Christopher Wojciechowski**, will be the principal consultants on this project. Christopher will be the primary Consultant on the project and will manage the day-to-day activities surrounding the engagement. Brian will serve in the *Advisory Partner* capacity for this project.

We have posted to our website a complete **TAS** client list detailing every client that we have served since our formation in 1987. We do not "screen" our list or provide only "selected" clients. We are very proud of our past efforts, and we encourage the proposal reviewers to contact anyone on our list. Reference letters and the complete client list can be found at www.TransportationConsultants.com.

Three K-12 References (as required by RFP Section 4):

1. Fayetteville-Manlius Central School District
2. Pittsford Central School District
3. Schenectady City School District

C. Officers and Consultants

Transportation Advisory Services, LLC (**TAS**) is incorporated in the State of New York. Brian Lafountain is authorized to bind the Company pursuant to this proposal.

- Transportation Advisory Services, LLC
- 171 Sully's Trail, Pittsford, NY 14534
- (800) 233-3251
- BLafountain@TransportationConsultants.com
- www.TransportationConsultants.com

D. Conflict of Interest Statement

The **TAS** consultants do not have, or have not had, a business or personal relationship, directly or indirectly, with any North Penn School District employees. Additionally, **TAS** does not sell or market services or products, and we do not accept finder's fees or commissions from any provider of services. We do not operate or manage transportation systems, or serve as contractors, thereby eliminating any potential conflict of interest. This independence is particularly important given that this engagement includes strategic assistance in developing the 2028-2029 contracted-services RFP — a role that requires absolute vendor neutrality.

TAS is the **only** student transportation consulting firm that can stipulate officially subscribing to the nationally recognized Code of Ethics of the Institute of Management Consultants.

PART II – Project Scope of Services

The scope below is organized to mirror the eight (8) work areas defined in NPSD RFP Section 2, with TAS's methodology applied to each.

A. Fleet, Equipment, and Propane Infrastructure Audit (NPSD RFP §2.1)

TAS will conduct a physical audit of the District's current fleet, evaluating the condition, age, and utilization of each vehicle. We will review the maintenance shop equipment, tools, and hardware required for daily operations, and we will assess the propane fueling infrastructure for alignment with the District's sustainability goals — including tank capacity, dispensing throughput, redundancy, safety compliance, and long-term suitability given the pace of transition to alternative fuels and electrification. Our fleet review will produce a data-driven vehicle replacement schedule, recommendations for spare-ratio right-sizing, and a capital forecast covering the next five to ten fiscal years. Included in any fleet recommendations will be the potential impact of any routing or bell-time changes.

B. Facilities, Garage Operations, and Capacity Analysis (NPSD RFP §2.2)

TAS will review the functionality of the transportation facility, including its impact on the ongoing operation of the program. TAS has been engaged over the years to assist districts in the review of facilities, including providing assistance to architects in the design of new structures. We will analyze current use of the bus garage and maintenance space to optimize workflow, review existing garage-improvement plans, and provide recommendations for facility upgrades or expansions. Our operational workflow review will cover traffic flow, bus parking configuration, mechanic workspaces, fueling access, and dispatch operations for efficiency and safety. We will conduct a formal capacity analysis to determine whether current garage and parking facilities are sufficient to support projected fleet and staffing growth — coordinated with the demographic analysis in Section H below.

C. Workforce and Staffing Analysis (NPSD RFP §2.3)

TAS will review the organizational structure of the transportation program, including personnel assignments, training, sufficiency, and areas of responsibility. Our workforce analysis will cover:

- Driver and Aide Workforce Sizing relative to student transport needs, including current-versus-required headcount and substitute pool depth.

- Office and Support Staff Efficiency — routing, dispatch, and mechanic-to-fleet ratios benchmarked against industry norms.
- Recruitment, Retention, and Absenteeism Review — hiring practices, turnover trends, overtime utilization, and retention strategies for drivers, aides, mechanics, and dispatch staff.
- Program-management systems and procedures, including labor time tracking, payroll processing, and attendance reporting.

D. Technology and Software Review (NPSD RFP §2.4)

TAS will conduct a comprehensive review of the District's transportation software ecosystem — including Transfinder, Bus Hive, and Bus Conduct — and assess the useful life and integration of all supporting hardware, including tablets, GPS, on-board cameras, and Automated School Bus Enforcement (ASBE) systems. Our review will identify (a) opportunities for improved utilization and training of existing platforms, (b) integration gaps between systems, (c) technology lifecycle-replacement schedules, and (d) ASBE program-performance metrics against comparable deployments. Where warranted, we will recommend platform upgrades, additional modules, or replacement — always framed against the practical operational realities of the District and free from any vendor commission relationships.

E. Financial and Cost Analysis (Three-Year Review) (NPSD RFP §2.5)

A critically important consideration of each area that we study will be the financial impact that any proposed changes could have upon the District. TAS will perform a three-year review of all departmental costs, including fuel, utilities, parts, labor, and administrative overhead. We will benchmark current in-house costs against contractor rates and regional benchmarks — a critical input to Section F below (Strategic RFP Assistance). We will provide long-term capital-forecasting projections for anticipated capital expenditures related to fleet replacement, facility improvements, and technology upgrades. It is important to state that this is not a financial audit, but a review from an experienced transportation consultant.

F. Strategic RFP Assistance — 2028-2029 Contracted Services (NPSD RFP §2.6)

TAS has provided Transportation RFP / Bid Management Services to school districts across the U.S., including recent engagements with Providence Public School District, Valley CSD, Batavia CSD, Newfane CSD, and Auburn Enlarged CSD. Consistent with the NPSD RFP timeline — drafting to begin Spring 2027 for the 2028-2029 school year — TAS will provide professional assistance in developing the Request for Proposal for contracted bus services. This phase would include:

- Program and specification review, incorporating the operational findings of the Phase 1 audit
- Draft RFP document development and District/legal review coordination
- Contractor notification, publication, and distribution of specifications
- Pre-submission meeting facilitation with prospective contractors
- Bid/proposal evaluation, negotiation support, and contract-award assistance

Please see Part IV, Section A for pricing of this component (proposed as an optional add-on so the audit fee remains competitive).

G. Optimization and Efficiency Recommendations (NPSD RFP §2.7)

TAS will evaluate specific cost-reduction measures, including financial-impact quantification. Our review will identify strategies to streamline internal and external communication, assess maintenance data visibility for tracking labor hours and shop throughput, and recommend a suite of Key Performance Indicators (KPIs) and reporting dashboards for ongoing departmental monitoring and accountability. We will identify opportunities to improve routing efficiency, preventive maintenance scheduling, dispatch coordination, and daily operational workflows. Where possible, recommendations will be quantified with dollar-range impact estimates to support Board and community decision-making.

H. Departmental Feasibility and Demographic Analysis (NPSD RFP §2.8)

TAS will assess current and projected student population for NPSD (approximately 13,000 students transported daily) and develop long-term projections to inform future operational planning. We will analyze the current requirements of the 10-mile radius for non-public school eligibility and its impact on the required number of buses, drivers, and associated costs. We will evaluate the long-term feasibility of maintaining a primarily in-house transportation service given projected student population growth and current resource constraints — including the national driver shortage — and we will review student ridership data against bus capacity to evaluate the efficiency of current routes (including non-public routes that may involve long commute times). Our final recommendation will identify a sustainable service model that balances operational efficiency (mileage, fuel use) with fair and equitable student ride times.

PART III – Proposed Timeline and Methodology

A. Timeline

In many ways, the District controls the timeline for this engagement. Once the engagement begins, we will require the assistance of the District to facilitate the scheduling of meetings and the return of the data collection instrument. Consistent with NPSD's stated project schedule (RFP released June 10, 2026; proposals due July 8, 2026; interviews the week of July 20; final selection / Board vote August 20, 2026), the following timeline is proposed:

Sample Timeline	Target
Proposal submission	July 8, 2026
Interview with District	Week of July 20, 2026
Final selection / Board award	August 20, 2026
Acceptance of TAS proposal & PO issuance	Late August 2026
Issuance of data collection instruments by TAS	September 2026
Data submitted to TAS	September – October 2026
On-site interviews, physical fleet/facility audit, ridership audit	October – November 2026
Interim recommendations	December 2026
Draft final report	January 2027
Final report delivery & Board presentation	February 2027
(Optional) RFP Assistance kickoff — 2028-2029 contracted services	Spring 2027

It is important to state that this timeline is used for sample purposes only and can be accelerated in certain areas if there are time-sensitive issues that need to be addressed.

B. Methodology

Based on our many years of experience with successful efficiency studies, the following process is recommended:

- **Data Collection** — TAS will develop and issue a data collection instrument designed to gather three years of operating and cost data from the District. This data will be reviewed prior to on-site meetings.
- **Physical Fleet, Equipment & Facility Audit** — On-site inspection of all buses, shop equipment, propane infrastructure, and garage/parking configurations (unique to this engagement given RFP §2.1 and §2.2).
- **Ridership Audit** — Actual-versus-scheduled ridership evaluation on all runs, typically conducted over a five-day period.
- **Stakeholder Interviews** — District Administrators, Building Principals, Athletic Director, Special Education Director, Transportation Coordinator (Dennis Ryan), office staff, mechanics, drivers, aides, dispatchers, routers, and community members as appropriate.
- **Technology Assessment** — Structured review sessions with the users of Transfinder, Bus Hive, Bus Conduct, GPS/camera vendors, and ASBE stakeholders.
- **Financial Benchmarking** — Three-year cost review with in-house-vs-contractor benchmarking against regional and national norms.
- **Demographic Modeling** — Enrollment and ridership projections modeled against non-public 10-mile mandate and driver-shortage sensitivity.
- **Interim Recommendations** — Delivered throughout the study for items that can be implemented immediately.
- **Final Report & Presentation** — Comprehensive report with prioritized recommendations, quantified financial impact ranges, KPI/dashboard framework, and capital forecast; optional Board of Education presentation included.
- **Ongoing Assistance** — Availability for follow-up consultation as the District implements recommended changes.

C. Report Structure and Results

The District will be provided with a PDF of the final report to facilitate distribution to appropriate individuals. If requested, bound copies will be printed for each Board Member, the Superintendent, the Business Official, and the Coordinator of Transportation. A final presentation to the Board of Education is included in the base fee at the District's option.

PART IV – Cost Proposal

A. Consulting Fees

Base Engagement — Comprehensive Operational Audit (RFP §§ 2.1–2.5, 2.7, 2.8):

The fee for the Comprehensive Transportation Operational Audit, consistent with this proposal, is based on a fixed fee of **\$50,000**, which does not include any out-of-pocket expenses incurred as detailed in Section B.

Payment schedule:

- Initial payment (PO / kickoff) — **\$16,667**
- Interim payment (completion of data analysis and interviews) — **\$16,667**
- Final payment (submission of final report) — **\$16,666**

Optional Add-On — Strategic RFP Assistance (RFP §2.6, drafting begins Spring 2027):

Consistent with our standard Transportation Bid/RFP Management Services engagements, the fee for full RFP-drafting and bid-management services for the 2028-2029 contracted-services procurement is quoted at a fixed fee of **\$18,000**, billable per a schedule to be established at the time this phase is initiated.

This add-on may be engaged at the District's option under the same Master Agreement, or contracted separately at that time.

B. Expenses

As stated in the "Consulting Fees" section, the proposed project is quoted at a flat fee — not including expenses. All expenses related to the performance of this contract will be reimbursed to TAS by the District. Expenses will consist of mileage at the applicable IRS reimbursement rate, parking fees, shipping charges, postage, road tolls, lodging, meals, and any other direct expenses related to the process that are approved by the District. Given the distance between Pittsford, NY and Lansdale, PA, TAS anticipates 2–3 multi-day on-site visits during Phase 1; travel expenses will be tracked and billed at cost.

C. Incremental Services

Should any additional on-site meetings be requested by the District beyond those contemplated in this proposal, TAS reserves the right to charge a per-diem rate of \$1,600 (\$200 per hour), plus

expenses, for such services. TAS will notify the District in advance of any such charge to allow the District to determine the necessity of the on-site visit.

D. Payment Terms

The structured payments are detailed in Section A above.

E. Proposal Acceptance

To signify the District's acceptance of this proposal, please provide us with a duly authorized Purchase Order, specifying your acceptance of the terms and conditions of this proposal. Once TAS is notified of the engagement, we will provide the District with a W-9 for your files. TAS will then issue the District an invoice for the retainer.

Respectfully submitted,

[Insert signature image OR type "Brian Lafountain" in script font, 24pt italic]

Brian Lafountain, CPA, CFE President, Transportation Advisory Services, LLC