

How to Choose a Transportation Consultant

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In selecting a firm to evaluate your transportation program, a weighted scoring sheet with an array of criteria can help to evaluate bids.

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as your school district ever thought about getting “outside” help in order to gain an independent perspective about the transportation program?

The search for a qualified consultant, as well as the hiring and selection process, can be frustrating and difficult. All too often, districts select accountants or retired administrators who do not have a full understanding of the demands and technical requirements of a transportation system. The results of these studies typically include detailed charts and graphs, but the recommendations may not be practical or beneficial.

The hiring process

The selection of a transportation consulting firm should be looked at in the same fashion as the hiring of any other professional service. You should begin the search by gathering referrals from other districts in your area. From there, you can gather the names of additional prospects from the state pupil transportation director, industry publications and the Internet. It helps to network at state, regional and national conferences. Your contacts would probably be happy to provide you with referrals.

Once you find the names, how do you choose a firm that will best fit your district? It is important that the district feel comfortable with the consultant. The public perception of the study and the resulting recommendations are critical. As you evaluate the consultant, do you believe that the firm demonstrates the knowledge and integrity that will be required? Does the consultant demonstrate the ability to explain the study process and the results in a professional manner?

Determine the scope

Before requesting a comprehensive proposal from the consultants, it is very important to detail the scope of the study. Is the study a management review? Is it focused on specific operating issues? Are you looking for an overall review of the transportation program or are you interested in technical assistance in a defined area? Will the consultant be expected to assist with implementation of any recommendations after the study?

Once you’ve defined the scope of the study and gathered detailed proposals from consulting firms, how do you select the proper firm? Transportation Advisory Services developed a comparative checklist (see sample form on pg. 60) to assist districts with the selection process. The list details numerous areas that should be considered as the district evaluates consulting options.

In order to effectively use the checklist, it will help to follow these basic steps:

1. Review the criteria and remove any that are not appropriate.
2. Assign a weighting factor to each item. For example, if the issue is “very important” assign 3 points, “somewhat important” assign 2 points, and “not very important” assign 1 point.
3. Review each firm and rate the firm on each item with 5 points awarded for excellent, 3 points for average and 1 point for poor. Enter this number in the “points” column under the firm’s name.
4. Multiply the weighting factor assigned in step 2 by the rating assigned in step 3 and place the result in the “total” column.
5. Add the totals from each column to reach a grand total. →

Although this grand total should not be the absolute evaluation of any firm, it will provide a relative comparison of strengths and weaknesses.

The performance factors on the checklist are self-explanatory. However, here are some thoughts on each item:

Is the firm independent and unbiased?

This is quite important in the age of corporate mergers and alliances. Is the consulting firm tied in any way to other companies and/or associations in the same industry? If so, these ties may influence the way firm representatives interpret or present their findings.

Does the firm offer both public- and private-sector experience?

Dual perspectives give the consulting firm the ability to see issues from both points of view, which can result in more innovative solutions to problems.

Do the consultants offer real-world experience?

Have the individuals who will be working on your project had any hands-on experience in the day-to-day management of programs similar to yours? If so, there is a much better chance of getting workable, real-world recommendations. If not, the efforts of theorists or senior level management types who were never in the field may result in a final product that is of no use to you or your organization.

Have the consultants ever operated a similar program?

An individual who has dispatched trucks for food/beverage delivery is not the individual you want evaluating routing in a school district setting. Make sure that the experience a consulting firm touts is very closely related to the service you want it to review.

Have the consultants ever negotiated a labor agreement?

Reading and understanding a labor agreement and its impact on

Authors Christopher J. Andrews and Mark A. Walsh (pictured) are partners in the firm Transportation Advisory Services. Copies of the checklist mentioned in this article can be found at www.TransportationConsultants.com.



the operation of the program are major strengths of any consultant reviewing labor-intensive programs. A lack of such experience can impede a consultant's ability to implement its recommendations.

Have the consultants ever participated in a bid as a vendor?

This again relates to real-world experience and can greatly influence the usefulness of the bid specifications or request for proposal. Since a contract is only as good as the specifications that define it, this is a critical strength or weakness of a consultant — especially if the project is strongly related to this topic.

Have the consultants ever reviewed a similar program?

The best consultant is a specialist, not a generalist. Just because a consultant has had success in one field does not automatically translate to success in other fields. Knowledge of school lunch programs does not readily adapt itself to knowledge of school transportation!

Does the firm sell any products other than consulting services?

If so, buyer beware. The most common example is software vendors that purport to be management consultants. Guess what their recommendation will be!

Has the consultant provided a detailed reference list of all past clients?

If not, chances are the list has been cleansed of any problem clients. Not every project can be a stellar success, but consistent flaws can indicate a problem with the firm or its study process.

Quality of references?

If references the consultant does provide are poor, then not only has the consultant not performed well, but he has not followed up with the clients to verify their progress since the study was performed.

Was past work completed on time and within budget?

Your proposal from the consultant should consist of a firm timeline and related costs. If past clients report that similar proposals were not adhered to, a flag should go up about possible problems in the completion of your project.

Did consultants meet or exceed expectations?

Watch out for consultants whose promises of performance exceed their capabilities. This happens often with inexperienced consultants anxious to get their first big project.

Were consultants sensitive to political issues?

Although not always readily apparent, this skill can save many projects. When dealing with school districts, there are many factions with a wide variety of agendas. Sorting through this information prior to making recommendations can make a big difference in how widely accepted the study results are, as well as how easily the recommendations may or may not be implemented.

Would references hire the consultants again?

If not, enough said!

Cost?

Can the work you desire be accomplished for the dollars you have available? Is the amount quoted within a reasonable price range compared to any other quotes received? Compared to similar consulting projects performed for similar schools? Is there a cap on expenses?

Size of firm?

Too large of a firm can result in your project being assigned to some-

one other than the individuals who presented your proposal — and someone not as skilled as you had envisioned. Too small of a firm can result in the lack of back-up (as noted above) or an inability to complete the work on time due to an overload of project work.

Do firm representatives demonstrate professionalism?

The way they market themselves tells you about the way they will conduct themselves during the study process. If you can't wait for the presentation to end so they'll leave your office, chances are you won't like their consulting style either.

Does the firm have potential conflicts of interest?

For example, if you've contracted a study to evaluate the pros and cons of privatization, and one of the consultants works part-time for a contractor in the same industry, there is a potential conflict. Similarly, if one of the consultants in this example is affiliated with an association within the industry (public or private sector), there may also be a conflict. You want an unbiased opinion.

Are the consultants full time and dedicated to consulting?

There are literally thousands of retired, downsized or part-time workers billing themselves as consultants. Although some do in fact offer valuable services, you are far better off engaging the services of individuals dedicated to their careers as consultants and active in their chosen field. The results you'll achieve from their efforts will generally be more current and useful than those you'll achieve from consultants not as concerned about your reference and their future.

Does the firm offer opportunity for additional assistance in the future?

This relates to the issue of longevity. Will the firm be around in several years to provide follow-up work on the project if needed?

Do the consultants offer industry contacts?

The value of consultants isn't limited to what they know — it's who they know as well. Having the resources and the contacts available means having the ability to point

you in the right direction when specific needs arise. And in most cases, the consultant can provide unbiased references for goods and/or services of other vendors.

Does the firm's reputation offer strength for community acceptance of study and recommendations?

Having successfully completed 300 similar projects lends a greater degree of credibility than having two or three studies to reference. Positive recognition by trade journals and industry associations also enhances the acceptance of the report.

Find a comfort level

Look for a consulting firm that you feel comfortable working with. Do you want these individuals representing the district at public meetings? Are you ready to give them unlimited access to staff and records?

Bear in mind that the consulting project is just laying the groundwork — it's the implementation of the recommendations that is really important. Check references randomly and ask the same questions of each school. SBJ

Sample Comparative Checklist

Performance Factor	Weighting Factor	ABC CONSULTING INC.		XYZ CONSULTING INC.	
		Points	Total	Points	Total
Independent and non-biased?	3	3	9	1	3
Public- and private-sector experience?	2	5	10	3	6
Operated a similar program?	2	1	2	5	10
Negotiated a labor agreement?	1	1	1	3	3
Participated in a bid as a vendor?	2	3	6	1	2
Reviewed a similar program?	2	5	10	5	10
Quality of references?	3	5	15	5	15
			TOTAL 53		
					TOTAL 49

In this abbreviated rating sheet, ABC Consulting Inc. outscored XYZ Consulting Inc. by 4 points. Each evaluation used the same weighting factors, which are assigned based on the needs of the particular transportation program. The complete checklist is available at the following Website: www.TransportationConsultants.com.