



Bonsall Union School District

District Office and Transportation Review

May 22, 2008

Joel D. Montero
Chief Executive Officer



CSIS California School Information Services

May 22, 2008

Dr. Jeffrey P. Felix, Ed.D., Superintendent
Bonsall Union School District
31505 Old River Road
Bonsall, California 92003

Dear Dr. Felix,

In February 2008, the Fiscal Crisis and Management Assistance Team (FCMAT) entered into an agreement for a maintenance and operations/facilities review with the Bonsall Union School District. The request specified that FCMAT would:

1. Conduct individual interviews and review job descriptions for the District Office staff including the Superintendent, Assistant Superintendent and six employees; interview school site and department administrators to confirm the level of customer service; evaluate the current distribution of workloads to confirm that appropriate segregation of duties and sound internal controls are in place; and provide recommendations for improvements in each area, as necessary.
2. Conduct an overview of the district's Transportation program and identify options and recommendations that if implemented, will enable the district to better control or reduce encroachment by 2009-10.

The attached final report contains the study team's findings with regard to the above areas of review. We appreciate the opportunity to serve you, and we extend our thanks to all the staff of the Bonsall Union School District.

Sincerely,

Joel D. Montero
Chief Executive Officer

FCMAT

Joel D. Montero, Chief Executive Officer

1300 17th Street - CITY CENTRE, Bakersfield, CA 93301-4533 • Telephone 661-636-4611 • Fax 661-636-4647
422 Petaluma Blvd North, Suite. C, Petaluma, CA 94952 • Telephone: 707-775-2850 • Fax: 707-775-2854 • www.fcmat.org
Administrative Agent: Larry E. Reider - Office of Kern County Superintendent of Schools

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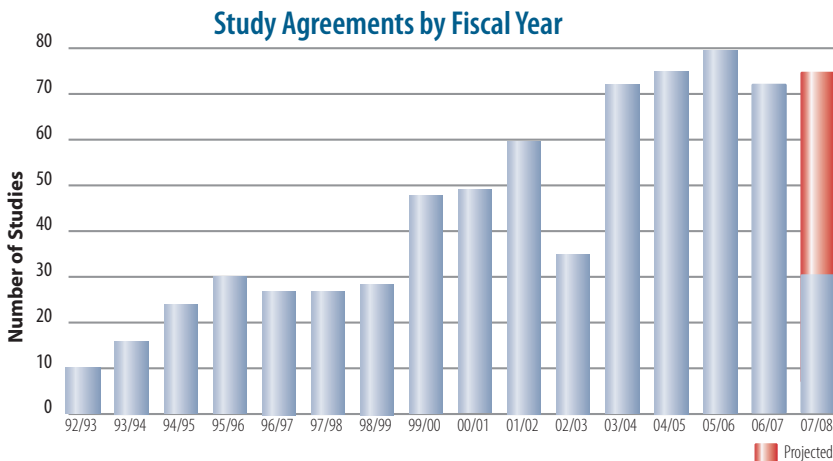
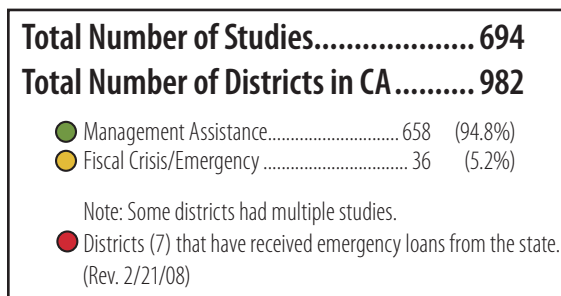
Foreword

FCMAT Background

The Fiscal Crisis and Management Assistance Team (FCMAT) was created by legislation in accordance with Assembly Bill 1200 in 1992 as a service to assist local educational agencies in complying with fiscal accountability standards.

AB 1200 was established from a need to ensure that local educational agencies throughout California were adequately prepared to meet and sustain their financial obligations. AB 1200 is also a statewide plan for county offices of education and school districts to work together on a local level to improve fiscal procedures and accountability standards. The legislation expanded the role of the county office in monitoring school districts under certain fiscal constraints to ensure these districts could meet their financial commitments on a multiyear basis. AB 2756 provides specific responsibilities to FCMAT with regard to districts that have received emergency state loans. These include comprehensive assessments in five major operational areas and periodic reports that identify the district’s progress on the improvement plans.

Since 1992, FCMAT has been engaged to perform nearly 700 reviews for local educational agencies, including school districts, county offices of education, charter schools and community colleges. Services range from fiscal crisis intervention to management review and assistance. FCMAT also provides professional development training. The Kern County Superintendent of Schools is the administrative agent for FCMAT. The agency is guided under the leadership of Joel D. Montero, Chief Executive Officer, with funding derived through appropriations in the state budget and a modest fee schedule for charges to requesting agencies.



Introduction

The Bonsall Union School District is located in the northernmost portion of San Diego County and provides instruction to students from kindergarten through eighth grade at two elementary schools, one middle school, and one charter school site. Although enrollment has been steadily increasing over the past seven years, fewer students attended district schools in 2004-05 and 2006-07 as compared to the prior year. CBEDS enrollment for 2007-08 was 1,908 students.

The district Superintendent contacted the Fiscal Crisis and Management Assistance Team in late December 2007 to request a review of two areas of district operations. The scope of work determined by the district called for FCMAT to complete the following:

1. Conduct individual interviews and review job descriptions for the District Office staff including the Superintendent, Assistant Superintendent and six employees; interview school site and department administrators to confirm the level of customer service; evaluate the current distribution of workloads in order to confirm that appropriate segregation of duties and sound internal controls are in place; and provide recommendations for improvements in each area, as necessary.
2. Conduct an overview of the district's transportation program and identify options and recommendations that if implemented, will enable the district to better control or reduce encroachment by 2009-10.

Study Team

Barbara Dean
Deputy Administrative Officer
Fiscal Crisis and Management
Assistance Team
Bakersfield, California

Larry Laxson*
Director of Transportation
Cajon Valley Elementary School District
El Cajon, California

Tim Purvis*
Director of Transportation
Poway Unified School District
Poway, California

Laura Haywood
Public Information Specialist
Fiscal Crisis and Management
Assistance Team
Bakersfield, California

*As members of this study team, these consultants were not representing their respective employers but were working solely as independent contractors for FCMAT.

Study Guidelines

The study team visited the district on April 8-9, 2008 to conduct interviews, collect data and review information related to district office staffing, workloads, and internal controls; and transportation operations. This report is the result of these activities and is divided into the following sections:

Executive Summary

District Office

- Comparative staffing survey results
- Distribution of workloads
- Customer service
- Internal controls

Transportation Program

- Transportation options
 - Radius zones based on state reimbursement funding only
 - Radius zones based on contribution of parent fees for service
- District vehicle maintenance
- Communication

Executive Summary

The Bonsall Union School District is located in the sprawling hills of north San Diego County, with Interstate 15 and Highway 76 intersecting in its center. The district is 88 square miles in size, and is generally rural. The district serves elementary students in grades K-8 and feeds into the Fallbrook Union High School District. The district has approximately 1,900 students attending four schools:

Bonsall Elementary School, grades K-5
Bonsall West Elementary School, grades K-5
Vivian Banks Charter School, grades 1-5
Sullivan Middle School, grades 6-8

The district office is located on the edge of the Bonsall Elementary School campus and houses eight FTE in two buildings because of the lack of a single facility that can house everyone. The physical separation contributes to a staff sense of “us” and “them.” The elementary school will move to new offices and classrooms on the campus in the 2008-09 school year, and it is anticipated that the district office will transition into a portion of the buildings that formerly housed site staff and students. Moving to new facilities should restore cohesiveness among the district office staff and reinforce the common mission of providing administration, customer service, accountability and compliance, and operational support to the district’s students and instructional programs.

Staffing in the district office is compared to that of other districts in this report. Although there is no industry staffing standard to determine an appropriate number of employees, it is the conclusion of the team that the overall staffing level in the district office may be .5 to 1 FTE less than is needed to adequately oversee and manage a district of this size. More important, however, is that the assignment of tasks and distribution of workloads is not consistent and does not ideally match the skill sets of current employees to the work that needs to be completed. Employees who may have transitioned from a previous assignment to a new assignment in the district often retain some of the tasks of the old position because they did them well. Some positions have tasks that are otherwise unrelated to the core tasks of their positions because the employee(s) are willing and able to take on additional duties.

Overtime is routine for some positions and cyclical or seldom occurring in others. Reporting deadlines are not missed, in some cases only because extra time is worked to comply with required due dates. To correct inconsistencies in some of the tasks assigned to various positions, the district should consider reassigning tasks to other positions when the management, subject area, or reporting function is consistent with tasks already assigned to that position. Appropriate personnel procedures should be followed when revising assignments or job descriptions. Employee evaluations have not been kept up to date.

Communication of information between the district office and the school sites could be improved. The Bonsall University event conducted last year should be repeated prior to the beginning of school in 2008-09 and expanded to include classified staff. Standards for school sites for curriculum delivery, certificated evaluations, school safety and other areas should be developed and implemented. Expanded access to budget information by site and program administrators would reinforce understanding and use of available funds and increase accountability for operating within available resources. The number of questions directed to the district office could be reduced as staff training, easy access to information, and updates on district policies and practices are standardized.

Internal controls in the business office appear consistent with industry standards. The district is to be commended for receiving no audit findings related to internal controls or any other areas reported in the independent audits for 2004-05, 2005-06, and 2006-07 conducted by Hosaka, Nagel & Co. and reviewed by FCMAT.

FCMAT developed two options for consideration relative to the transportation program. Both options require adopting radius zones to confirm eligibility for home to school transportation services. The district lacks formal policies or administrative procedures specific to transportable and non-transportable zones for each school site. Approximately 40% of the regular education students receive free transportation support services.

Option 1 provides processes and recommendations for the district to follow to confirm the level of regular home to school service that could be supported by the state entitlement without further funding support from the district's unrestricted general fund budget.

Option 2 provides an estimate of potential parent fees that would offset the excess costs of transportation. The appendix of the report includes preliminary plot maps for each school to assist the district in identifying the number of eligible riders outside 1, 1.5, 2, and 3 mile zone areas.

Regardless of the option approved by the governing board, the district should evaluate the effects of having a limited number of buses to assist in extracurricular activity trips if minimal levels of regular education home-to-school transportation services are provided with parent fees and the state reimbursement. Also, the district should confirm its ability to reinstate and financially support a home-to-school transportation program in the future if these services are eliminated due to fiscal constraints.

Interviews and documentation showed that very little internal vehicle maintenance is performed by district staff. The district has a history of contracting out for all major and routine types of vehicle maintenance service. With the exception of minor work on light vehicles, all maintenance on the district's white support fleet (all non-school bus vehicles) is performed through outside vehicle maintenance contracts. The district should evaluate

the cost effectiveness of performing preventative maintenance and minor to moderate vehicle repairs internally.

Some of the maintenance repair invoices for district vehicles and all of the district's fuel costs are charged as a home-to-school transportation expense, increasing the transportation program encroachment. All district-purchased fuel usage should be identified by vehicle number and internally charged to the appropriate program, e.g., regular education home-to-school transportation, special needs home-to-school transportation, district maintenance and operations program, food services program or warehouse program. A district preventative maintenance schedule for all vehicles should be created and implemented to ensure that proper care and maintenance is completed for maximum longevity. Regularly scheduled, ongoing meetings between the Assistant Superintendent of Business and the Lead Mechanic/Lead Driver should be conducted with an agenda of items that are essential to smooth operations including equipment repairs, scheduling conflicts, and CHP inspections.

At the time of FCMAT's fieldwork, the district had no substitute school bus drivers on staff. Four of the larger style school buses were not operable because their California Highway Patrol (CHP) 292 Inspection Certificates had expired, directly affecting the quality of student transportation services. Some students arrived at the middle school several minutes late and insufficient buses were available for student pickup in the morning and drop-off in the afternoon.

The Lead Driver or designee should immediately inform a school site when and why a bus will be late, including specifics on the approximate arrival time and the number of students that will be affected.

Monthly regular transportation staff meetings should be conducted by the Lead Driver and Assistant Superintendent of Business to share information and address questions from the drivers in a confrontation-free environment. If necessary, the district should work with a professional facilitator to help smooth routine communications.



District Office

The district office occupies two buildings on the edge of the Bonsall Elementary School campus. The Transportation Department and the Bonsall Community Center are also located adjacent to the school campus. Meetings of the Governing Board generally are conducted at the community center, which is owned by the district and operated as a joint use facility. The Migrant and Special Education programs are housed in the community center along with two preschool classrooms. The community has access to the center to hold a variety of meetings. The San Diego Parks and Recreation Department can use the facility after 5:30 p.m. on weekdays and on weekends.

Bonsall Elementary will be moving to new offices and classrooms on the campus in the 2008-09 school year and it is anticipated that the district office will transition into a portion of the buildings that formerly housed site staff and students. The remaining unused portion of the elementary facility may be demolished to expand the playgrounds and green areas of the campus.

The district office staff of eight FTE has been separated until now because of the lack of a single facility that could house everyone. One building houses the Superintendent, Executive Assistant, and Administrative Assistant; and the building next door houses the Assistant Superintendent of Business Services, payroll, Director of Accounting, accounts payable, and purchasing. Communications between the two buildings is adequate although during interviews the team noted that the staff relates to the physical separation as being “us” and “them.” Moving to new facilities should restore cohesiveness among the district office staff and reinforce the common mission of providing administration, customer service, accountability and compliance, and operational support to the district’s students and instructional programs.

The building that houses the business office staff is cramped, although staff have been able to complete their work effectively within its confines. The payroll employee does not have a private area in which to discuss confidential information with employees in person or by telephone. If the small conference room is not in use, that space can be used to conduct small or private meetings. The fax machine is located in the conference room and occasionally an employee must interrupt a meeting in progress to send or receive a fax. The payroll employee is located next to the entrance and exit door and her workstation is placed in such a way that she faces away from the door and must turn to see if someone coming into the office needs assistance.

Comparative Staffing Survey Results

Prior to evaluating the distribution of workloads and staffing of the district office, the team requested comparative data from other elementary school districts with comparable student enrollment through the FCMAT listserv for school district chief business officials. The comparisons in this report represent the districts that voluntarily responded to the request. It is important to note that in some districts, management of other instructional or operational programs could be assigned to employees who are not housed in the district office. Therefore, the FTEs of those positions might not be identified in the comparisons collected by FCMAT.

Districts are complex and may vary widely in demographics, resources and organizational structures. Distribution of tasks and functions by position often varies depending on the expertise of individual employees. A thorough evaluation is recommended when comparing staffing from one district to another, especially during these challenging budget times when some districts are reducing their staff to maintain fiscal solvency. The following local conditions can affect staffing levels positively or negatively in each individual district and thus affect the district's ability to provide the best instructional programs and operational support for staff and students:

- Demographic and logistic characteristics beyond the district's sphere of influence.
- External financial resources, including community donations, parcel taxes, general obligation bonds, and parent fees.
- Decisions made with regard to utilizing available resources to attract instructional staff or maintain/reduce class size.

Comparison of District Office Staffing

District	2007-08 CBEDS*	District Office Positions	Total FTE	No. of school sites
Bonsall Union Elementary	1,908	Superintendent, Executive Asst., Administrative Asst., Asst. Supt. of Business, Payroll, Director of Accounting, Accounts Payable and Purchasing	8.0	4
Pleasant Ridge Union Elementary	1,785	Superintendent, Asst. to Supt. (retired Supt. who works 80 days per year, .4), Administrative Asst., Business Mgr., Accounts Payable (.5), Purchasing (.5), Payroll, Director of Maintenance	6.4	4
Chowchilla Elementary	1,929	Superintendent, Secretary, Asst. Supt. of Curriculum & Instruction, Coordinator of EL & Reading programs, Administrative Asst., EL Secretary, Acct. Clerk / Receptionist, Acct. Asst., HR/Acct. Specialist (payroll, workers comp, credentialing), Child Nutrition Clerk, Special Ed Secretary, Warehouse / Maintenance	12.4	5
Auburn Union	2,229	Superintendent, Exec. Admin. Asst., Asst. Supt. of Business, Admin. Asst., Accountant, Payroll, Acct. Tech., Admin. Clerk, Secretary	9.0	4 plus a magnet school

* Source: DataQuest Web site

Distribution of Workloads

The team interviewed each member of the district office staff to confirm the tasks assigned to their position, their ability to complete the tasks in a timely manner, whether cross training has been completed, and what internal controls are in place. The district uses the systems provided by the San Diego County Office of Education to develop and monitor budgets, process payroll and purchasing, track and report attendance data, and maintain personnel records. Each member of the staff appeared busy during the two days the team was in the district.

Following the visit to the district, the team sent an electronic survey document to each member of the district staff, requesting responses to the following questions:

1. Do you consider your workload excessive? Are there any tasks that are not getting done or are not currently up to date because of your current workload? Are reporting deadlines missed?
2. If you are not overtime exempt, how often is it necessary for you to request supervisor approval for overtime? How often do you work overtime without pay and for how long past the normal workday?
3. Do you use external spreadsheets or databases to complete certain tasks? If so, please list the applications (Excel, Access, etc.) and the information that you need to track using these applications.
4. Hypothetically speaking, are there any tasks that you believe could/should be switched from your desk to another employee? If so, how would you fill the time that you had previously devoted to those tasks?
5. Is another employee trained to fill in for you if you were on vacation or were off duty for other reasons for more than seven days?
6. Are you able to attend meetings, workshops, conferences during the school year?
7. If there was one change that could give you more time to do what has to be done, what would it be?

Responses were recorded for each of the seven questions and are listed below. To provide each employee with a minimum level of confidentiality, employee names and position titles are not included with the responses.

1. **Is the workload excessive?** Two employees responded that their workload was excessive and required frequent time outside the normal workday to complete. Three employees responded that at times during the year their workload was excessive. Three employees responded that their workload was not excessive. All employees reported that deadlines are not missed, in some cases only because extra time is worked to comply with the required due dates.

2. **Need for overtime?** One employee reported the need to routinely work after hours during the week and on the weekend. Three employees reported working 1-1.5 hours extra each day during the week and up to one additional day during the month. One employee reported working 1-2 additional hours per week. One employee reported working one additional hour per month. Two employees reported no overtime worked.
3. **Use of external spreadsheets or data bases?** All employees reported that external spreadsheets and databases are used to complete the assigned tasks, in addition to relying on systems provided by the County Office.
4. **Reassignment of tasks to another position?** Two employees responded that certain tasks could/should be reassigned to another position or to a new position.
5. **Coverage during vacation or illness:** All employees responded that if necessary, other employees could cover their tasks in the short term. In some cases, several employees might be called upon to complete the tasks of certain positions because of the diverse assignments of those positions.
6. **Workshop or conference participation?** All employees responded that they are able to attend meetings and workshops during the year. In some cases, employees are hesitant to take time away from the office because of the impact to other staff while they are gone, or their ability to make up work missed while they were away. In some cases, employees have been able connect to webcasts to obtain information rather than traveling to a meeting.
7. **One change that could provide more time to get the job done?**

A full-time assistant or a position dedicated solely to data and reporting issues.
Reducing ongoing interruptions by scheduling appointments to respond to questions or concerns of school site staff or district office co-workers.

Hire additional staff.

No response.

Reconfigure the office layout to reduce interruptions.

No response.

Directing delivery of items to Bonsall Elementary once the new construction is completed and receiving packing slips from school sites as soon as the delivery is received.

No response.

Based on the comparative staffing information, staff interviews, and survey responses the team concludes that the overall staffing level in the district office may be .5 to 1 FTE less than is needed to adequately oversee and manage a district the size of Bonsall Union. More important, however, is that the assignment of tasks and distribution of workloads is not consistent and does not ideally match the skill sets of current employees to the work that needs to be completed. In addition, employees who may have transitioned from a previous assignment to a new assignment in the district often retain some of the tasks of

the old position because they did them well. Some positions have tasks that are otherwise unrelated to the core tasks of their positions because the employee(s) are willing and able to take on additional duties.

Some routine tasks are not being completed due to a lack of time, such as ongoing updates of job descriptions; and employee evaluations are not up to date.

Recommendations

The district should:

1. Document the amount of overtime needed to complete tasks to meet required deadlines. Devise strategies to more effectively manage data using the available county office systems and other automated applications, when possible, to complete tasks within normal work schedules.
2. Evaluate the assignment of tasks for each position and consider reassigning tasks to other positions when the management, subject area, or reporting function is consistent with tasks already assigned to that position.
3. Establish internal guidelines for responding to questions and the needs of the school sites to minimize the number of interruptions to staff throughout the day.
4. Expedite the move to larger facilities as soon as possible after Bonsall Elementary moves to its new offices and classrooms. Configure workstations to allow for privacy and easy access to files.
5. Update job descriptions as time permits, or consider bringing in an independent personnel specialist to assist on the project.
6. Bring employee evaluations up to date.

Customer Service

The team conducted interviews with two site principals and the Special Education/ Student Services Director to confirm the perceived level of customer service from the district office to the school sites and programs. One principal is new to the district and has not received any training on the site budget or the amounts allocated for site programs. Although district office staff are responsive to questions, annual budget training would improve the ability of the principal to be accountable for staying within the budget for the year. Regular meetings of the principals are held. Practices related to registration at school sites, curriculum delivery, certificated evaluations, school safety, and English Learner Advisory Committees (ELAC) and District English Learner Advisory Committees (DELAC) are not consistently applied at all district sites.

The second principal interviewed by the team has been in the position for four years and perceives that over the last few years the district office has become more efficient. For

the first time since this principal has been in the position the 2007-08 budgets included information that identified where site employees were being charged. School sites have the ability to view their budgets in the FIS system and print out screen shots of the page, although some principals may not have been trained to do so.

The Director of Special Education and Student Services has committed time over the past several years to work directly with the accounting director during budget development. The director also works closely with the payroll employee and the accounting director to identify percentages of employee time that will be allocated to each resource, and with the purchasing employee on acquiring necessary goods and services. Additional training in personnel practices and clarification of the people to contact at the district office and their roles would help administrators and directors outside the district office in their attempts to resolve issues.

Opportunities exist for the district office to expand training for school site and department staff on budgets, employee benefits, requisitions and purchase orders. The Bonsall University event held earlier this year for certificated staff was well received and the team was informed that the event may be presented to both classified and certificated staff in 2008-09. Expanded access to budget information by site and program administrators would reinforce understanding and use of available funds and increase accountability for operating within available resources. The number of problems and questions directed to the district office could be reduced as staff training, easy access to information, and updates on district policies and practices are standardized.

Recommendations

The district should:

1. Ensure that each e-mail sent to district office staff is responded to within a specified time period, and that incoming calls are answered by an employee. Give callers an estimated time for resolution or contact by another district office staff member if questions or problems cannot be resolved during the initial contact.
2. Develop standards that will be observed by each school site for curriculum delivery, certificated evaluations, school safety, ELAC and DELAC, and other areas not identified in this report.
3. Expand employee in-service meetings to include both certificated and classified staff, and include breakout sessions for training on budgets, employee benefits, requisitions and purchase orders.
4. Provide written directions for the school sites to access and print snapshots of their budget.

Internal Controls

Internal controls in the business office appear consistent with industry standards. Cash collections are kept in a locked cabinet until deposited, and duties are appropriately segregated between employees responsible for creating and distributing accounts payable or payroll warrants. The district is to be commended for receiving no audit findings related to internal controls or any other areas reported in the independent audits for 2004-05, 2005-06, and 2006-07 conducted by Hosaka, Nagel & Co. and reviewed by FCMAT.

Transportation Program

The district is experiencing some enrollment growth, with high potential for greater growth in the future. The school locations are generally spread across the district from east to west as the district's geographical layout follows a southwest to northeast elongated boundary.

Because the district is largely rural, a relatively high percentage of students participate in the home-to-school regular education transportation program. Approximately 725 students receive free transportation service daily.

The district has an aging school bus fleet with 10 larger Type I school buses (72-78 passengers), one Type I special needs school bus (14 ambulatory/four wheelchair), four district-owned passenger vans (two seven-passenger/one wheelchair, two six-passenger) and two long-term rental six-passenger vans. Six of the 10 larger school buses are used to transport approximately 725 regular education students daily. Additionally, all six passenger vans are used to transport approximately 27 special needs students per their Individual Education Program (IEP) instructions. Twelve of those students go to out-of-district non-public schools or regional special education programs.

The district has established a two-tiered district bell schedule to allow efficient use of the school bus fleet. Essentially, all regular education school bus routes can provide service to two schools in the morning, to kindergarten at mid-day, and to two schools in the afternoon.

At the time of FCMAT's fieldwork, the district had no substitute school bus drivers on staff. Four of the larger style school buses were not operable because their California Highway Patrol (CHP) 292 Inspection Certificates had expired, directly affecting the quality of student transportation services. Some students arrived at the middle school several minutes late and insufficient buses were available for student pickup in the morning and drop-off in the afternoon.

For 2007-08 the transportation revenues include a state reimbursement of \$393,331, flexibility transfers of \$17,045 and \$13,401 and a general fund contribution of \$324,722 to support the projected home-to-school expenses of \$748,499. In addition, the district's expense to operate the special needs transportation program is projected at \$156,000 for 2007-08.

The district performs very little in-house vehicle maintenance on school buses and almost no maintenance on other district support fleet vehicles. Documentation of vehicle repair is marginal and leaves the district vulnerable to Motor Carrier deficiency findings. Vehicle maintenance invoices for both internal and external contractor repairs are not appropriately charged to the programs to which the vehicles are assigned. Fuel invoicing is not identified by vehicle number to allow the appropriate program to be charged back, resulting in the regular education home-to-school expenses reflecting higher-than-actual costs.

Regularly scheduled departmental meetings do not occur, resulting in key information not being communicated in a timely manner. Nonexistent or untimely communication is also a problem between the transportation program leadership and the school sites. Schools are often notified of late buses just minutes before school begins or is dismissed. Sometimes no notice is given. Communications between the Assistant Superintendent and the Lead Mechanic and Lead Driver have apparently recently degraded. More specific findings and recommendations regarding communication are addressed in a later section of this report.

Transportation Options

As part of this review, the team was requested to identify options that, if implemented, could enable the district to continue to provide transportation services without general fund contributions and eliminate encroachment by 2009-10.

The district does not have a formal school board policy for home-to-school transportation services. There are no formal policies or administrative procedures specific to transportable and non-transportable zones for each school site. Approximately 40% of the regular education students receive free transportation support services. Bus depot points were recently implemented to serve as centralized student pickup and drop-off locations.

It appears that the district has historically provided a relatively high level of home-to-school transportation support for regular education students because of the very rural geography of the district, which includes roadways with few sidewalks or sufficient shoulders, numerous curves, and a fairly hilly terrain.

Option I

Radius zones based on state reimbursement funding only

Regardless of the option adopted, the district should establish home-to-school transportation eligibility criteria. The method supported by this report is the creation of eligibility radius zones around each of the district's schools. Students residing inside the radius or closest to the school would not be eligible for service, while students residing outside the radius of their assigned school boundary would be eligible for transportation services.

This strict implementation of transportable and nontransportable radius circles around each school does not take into account walking or driving paths. Additionally, strict interpretation of nontransportable and transportable areas created by the radius measurement does not account for the many possible hazards for pedestrians walking in a rural environment. It is important for all involved to accept that school districts are not mandated to provide home-to-school student transportation. State transportation reimbursements rarely cover the costs of a minimum level of service, and districts that offer and maintain higher levels of services are left to support the cost of operating their program with unrestricted general fund dollars.

Essentially, the radius design concept creates eligibility for home-to-school transportation services only for those students who reside outside the radius circle but within their home school boundary. The radius circles are typically created in mileage distances “as the crow flies,” recognizing the extent of equipment, labor, and maintenance costs up to the level of the state reimbursement and/or the additional dollars made available through district general fund contributions to the program.

If the district elects to adopt a radius approach to create criteria for home-to-school transportation service eligibility based solely on the state reimbursement, the transportation distance would be approximately 3 to 3.5 miles from each school. However, an analysis of residential student populations by school attendance zone would need to be completed to determine the exact distance the district would need to adopt. Unfortunately, this methodology is confined to analysis by logic and data and does not recognize potential hazard criteria in creating an option for operating the transportation program without general fund support.

The team has provided plot maps for each of the district’s schools identifying student residences. Radius circles are drawn at 1, 1.5, 2, and 3 miles around each school to identify the number of eligible riders outside any given radius measurement. A data box is contained on each map for reference. The maps are attached as Appendix A to this report.

Recommendations

The district should:

1. Carefully examine the residential student population densities in each school boundary to identify preliminary radius circles for transportable and non-transportable zones.
2. Determine the number of school buses, routes, staffing and maintenance and fuel costs the district can operate and support without exceeding the state reimbursement revenue.
3. Authorize transportation in areas outside final radius distances for each school site.
4. Carefully review the regular education home-to-school expenses and transfer the expenses that should be posted to other programs, leaving only the actual expenses of the home-to-school transportation program to consider in decision-making and planning.
5. Adopt board policy and administrative procedures for regular education transportation services operating solely within the reimbursement provided by the state.

Option 2**Radius zones supported by the state reimbursement and parent fees for service**

Education Code 39800 permits school districts to create a parent fee schedule for transportation of regular education home-to-school students. Within specific guidelines, a school district may adopt criteria for a fee-based regular education home-to-school transportation program. Essentially, if a school district chooses to adopt a fee-for-service program, it cannot generate additional revenue that exceeds the district's expenses for home-to-school transportation. Additionally, free ridership must be provided for students that meet low-income criteria. Fee-for-service programs have allowed an increasing number of school districts to maintain minimal levels of regular education home-to-school transportation services for students residing the farthest from their assigned home schools, thus reducing or eliminating general fund support.

Data gathered from other school districts suggests that a regular education home-to-school transportation fee-for-service program will actually only yield approximately 50% of those students made eligible through the district's criteria. Therefore, a fee-for-service program often results in a district being able to sustain minimum transportation services as fewer students and families choose to participate in a fee program.

Given the district's current student participation in home-to-school service, a fee-for-service transportation program would generate approximately \$96,900 based on a fee of \$300, and \$129,200 based on a fee of \$400. These calculations take into account a 50% drop in current student participation, leaving approximately 363 fee-paying students to be transported. This also allows for a 10% free ridership ratio of approximately 40 students. In this scenario, the district would also benefit from a reduction in operational expenses as two or three of the district's fleet could be eliminated because of the decreased number of students that would be transported.

Following the creation of transportation eligibility and non-eligibility radius criteria, district staff should apply the formula discussed above to the student eligibility criteria created and listed on the attached maps.

Recommendations

The district should:

1. Consider instituting a regular education home-to-school fee-for-service transportation program.
2. Determine the potential savings for transportation home-to-school service using a fee structure based on eligibility radius circles for each school, with reduced student participation levels.

3. Evaluate the effects of having a limited number of buses to assist in extracurricular activity trips if minimal levels of regular education home-to-school transportation services are provided with parent fees and the state reimbursement.
4. Determine the ability to reinstate and financially support a home-to-school transportation program in the future if these services are eliminated now due to fiscal constraints.

District Vehicle Maintenance

Interviews and documentation showed that very little internal vehicle maintenance is performed by district staff. The district has a history of contracting out for all major and routine types of vehicle maintenance service. With the exception of minor work on light vehicles, all maintenance on the district's white support fleet (all non-school bus vehicles) is performed through outside vehicle maintenance contracts. Moderate preventative maintenance through the Title 13 Motor Carrier 45 day/3,000 mile safety inspections is generally completed by district personnel on site, although in some instances it is performed on site by a contractor.

Some of the maintenance repair invoices for district vehicles and all of the district's fuel costs are charged as a home-to-school transportation expense, increasing the transportation program encroachment. All district-purchased fuel should be identified by vehicle number and internally charged to the appropriate program, e.g., regular education home-to-school transportation, special needs home-to-school transportation, district maintenance and operations program, food services program or warehouse program.

During the fieldwork for this study, four district-owned school buses were not currently certified by Motor Carrier for operation. One bus had not been certified for over 18 months. Three units were either not available for the regularly scheduled Motor Carrier inspection and certification or failed the inspection. As a result, three needed units were not certified for use, and there was some confusion regarding the level of urgency and who would reschedule the inspection date. At the end of the first day of fieldwork another school bus had to be sent out for transmission service, resulting in a shortage of available buses to meet the route scheduling demands. This shortage occurred because the district did not properly reschedule and follow up on the Motor Carrier inspections.

The district vehicle maintenance shop and facilities appear clean and well organized. There was a large amount of cleaning supplies that would appear not to be needed in an operation of this size. The inventory included some outdated parts.

The vehicle maintenance Lead Mechanic does not maintain a sufficient paper trail of requested repairs in a work order request format, nor a closed-out work order specifically identifying parts used, labor time expensed and repairs made. This could make the district vulnerable at an annual Motor Carrier terminal inspection.

The district operates two rental vans, which together cost approximately \$2,200 monthly, or \$26,400 annually. The rented vans are driven by district employees who are not school bus drivers. While the practice is legal, it could subject the district to further liability should a serious accident and/or injury occur. The district owns a 14 ambulatory/four wheelchair passenger bus that has not been operated in over 18 months and is not currently certified for operation. One or both of the rented vans likely could be eliminated, saving the district the annual rental expenses and placing the special needs students transported in these rented vans back into a conforming school bus operated by a certified school bus driver.

Recommendations

The district should:

1. Immediately implement an internal process for reviewing all district fleet invoices and properly code them for chargeback to the appropriate program.
2. Review available software packages to assist in proper documentation of fleet repair orders, inventory and labor tracking, and record keeping for vehicle history files.
3. Review the degree to which the district contracts out for vehicle maintenance repairs and determine the cost effectiveness of performing preventative maintenance and minor to moderate vehicle repairs internally.
4. Implement a district preventative maintenance schedule for all vehicles to ensure that proper care and maintenance is completed for maximum longevity. Assign the district's Lead Mechanic the responsibility of maintaining records for the district's full fleet maintenance and repairs.
5. Assign a fuel identification number to all district vehicles, and track fuel costs by vehicle to ensure appropriate chargebacks to the correct program.
6. Review the need and contractual arrangements for the two non-school bus rental vans, and determine if district owned and operated vehicles utilizing certified school bus drivers should be used to transport special needs students.

Communication

Communications are poor between the Assistant Superintendent of Business, who directly oversees the district transportation program, and the district's Lead Mechanic and Lead Driver. Adding to the communication challenge is a complete breakdown in communications between the district's drivers and the department supervisors, who are the Lead Mechanic and Lead Driver. As a result, some issues are not addressed in a timely manner. Meetings between transportation employees and the Assistant Superintendent of Business are infrequent. These meetings should be scheduled on an ongoing basis to sustain communications, avert problems, and support employee morale.

Daily operational needs or concerns that would be appropriately referred to higher supervisory levels are not being accomplished in a timely manner, as exemplified by several out-of-service school buses. The insufficient number of buses available during one day of the team's visit did not appear to significantly concern higher management, yet students were adversely affected by the resulting poor service.

Nonexistent or untimely communication is almost a daily occurrence between the transportation supervisor and school sites specific to late buses. School site personnel often do not know until minutes before the start or end of a school day that routing will be doubled as a result of bus or staffing shortages, or mechanical breakdowns. Instructional time is regularly interrupted by late arriving buses, specifically at the middle school. The team observed one bus arrive minutes late, affecting approximately 47 students. School employees were not informed that the bus was behind schedule and thus were not prepared to deal with the problem.

Recommendations

The district should:

1. Establish regularly scheduled, ongoing meetings between the Assistant Superintendent of Business and the Lead Mechanic and Lead Driver with an agenda of items that are essential to smooth operations including equipment repairs, scheduling conflicts, and CHP inspections.
2. Direct the Lead Driver or designee to immediately inform a school site when and why a bus will be late, including specifics on the approximate arrival time and the number of students that will be affected.
3. Institute monthly regular transportation staff meetings for both the Lead Driver and Assistant Superintendent of Business to share information and address questions from the drivers in a confrontation-free environment. If necessary, provide assistance from a professional facilitator to help smooth routine communications.

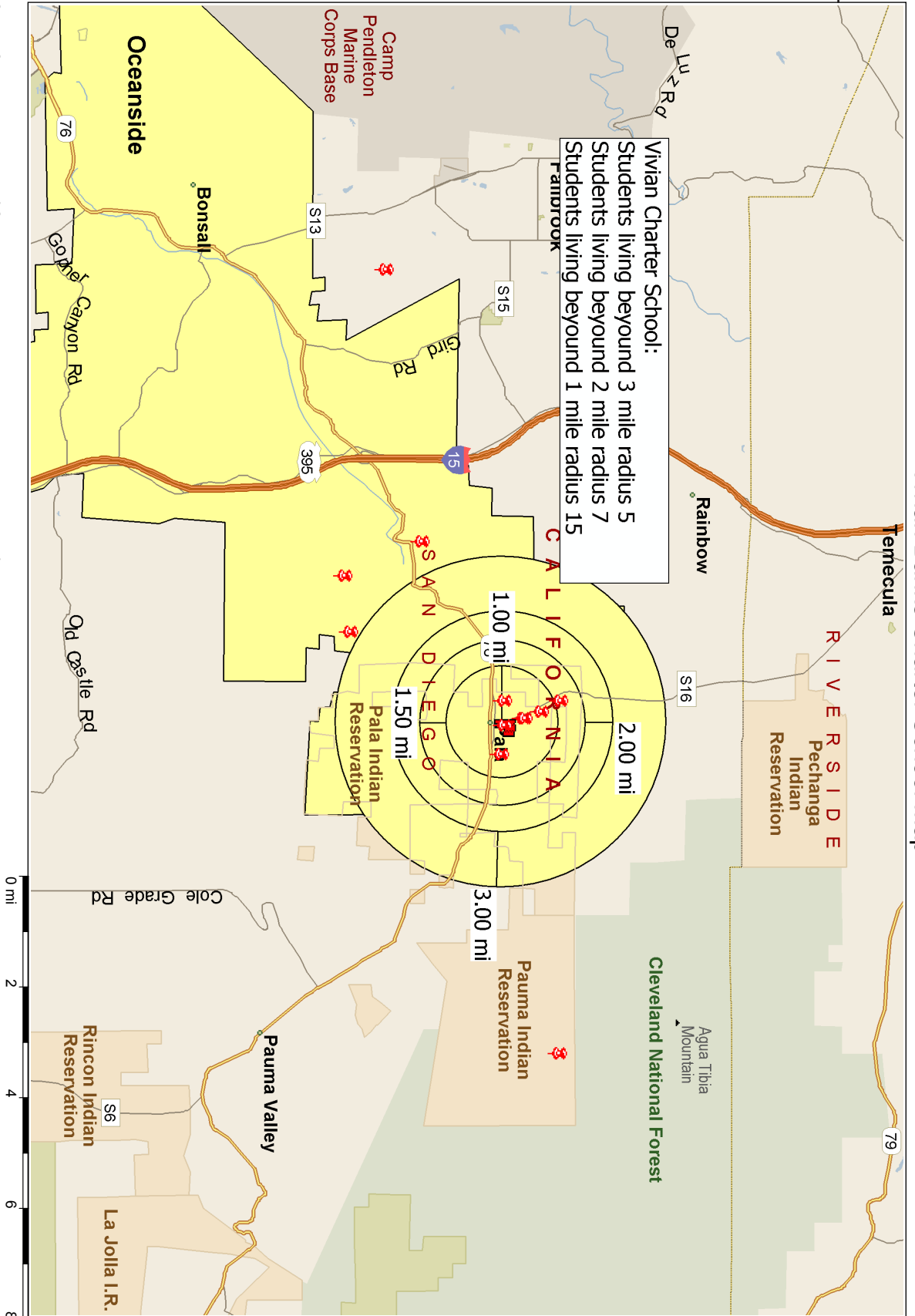


Appendices

Appendix A - Plot maps

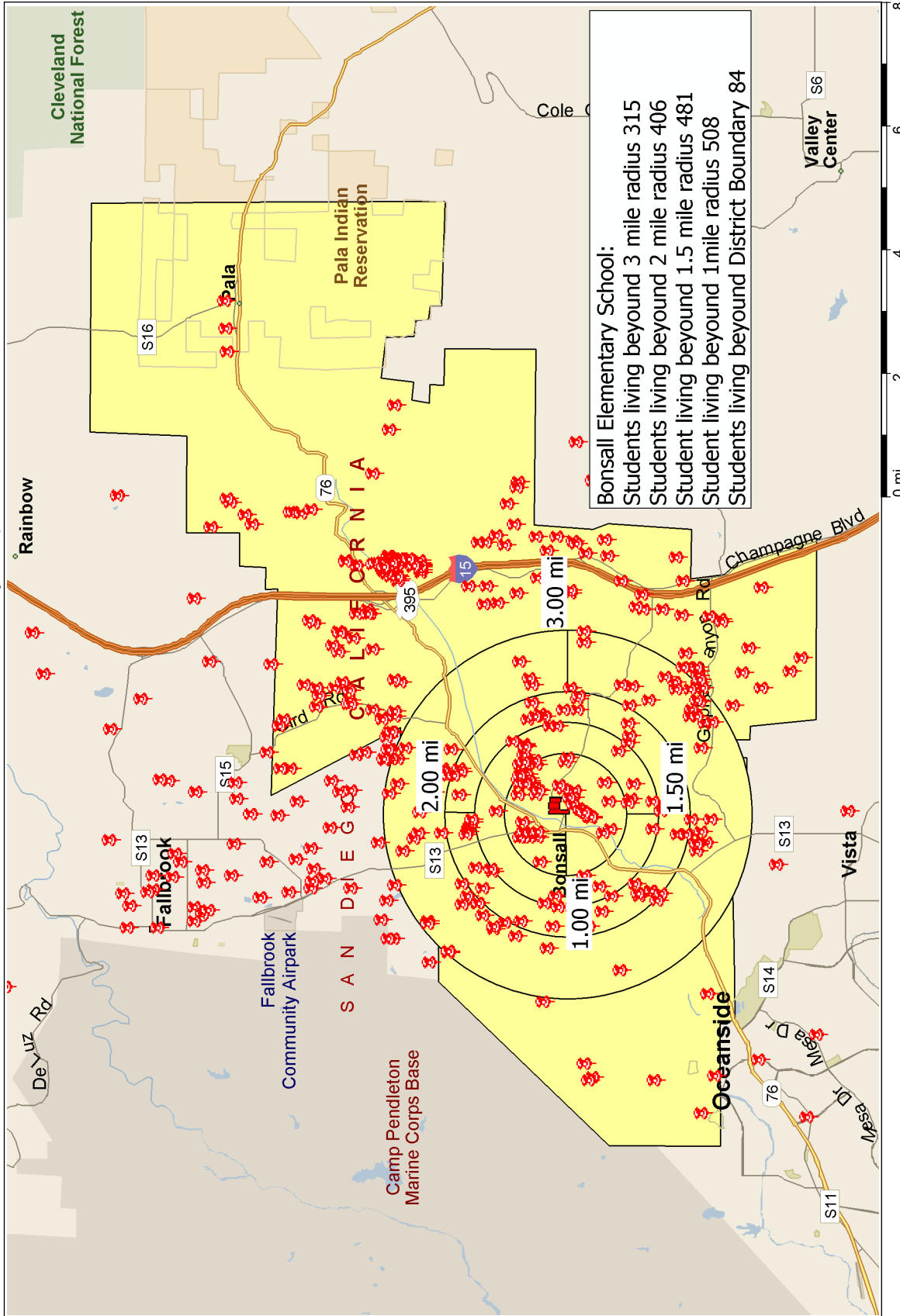
Appendix B - Study agreement

Vivian Banks Charter School Map



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Bonsall Elementary Map

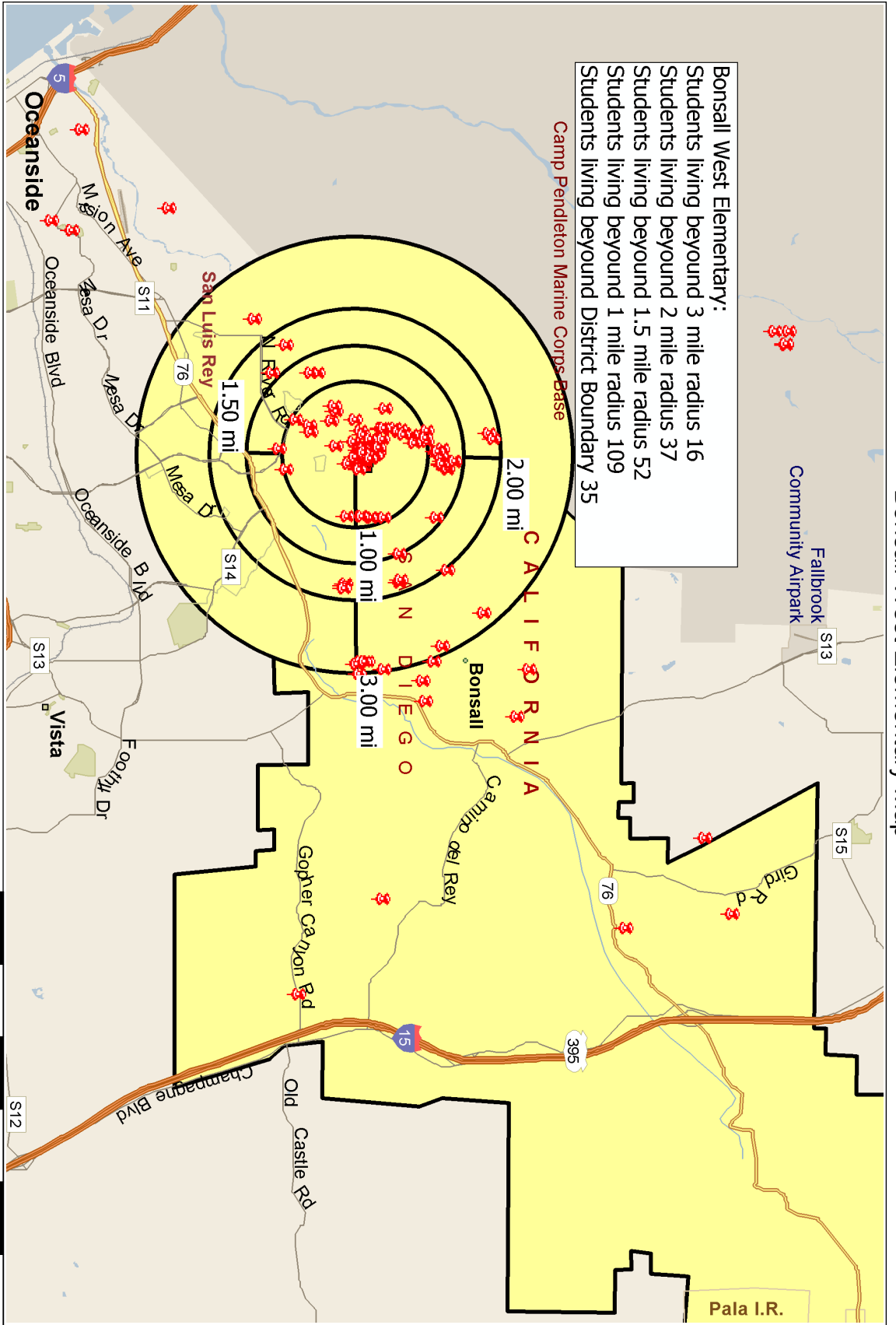


Bonsall Elementary School:
 Students living beyond 3 mile radius 315
 Students living beyond 2 mile radius 406
 Student living beyond 1.5 mile radius 481
 Student living beyond 1 mile radius 508
 Students living beyond District Boundary 84

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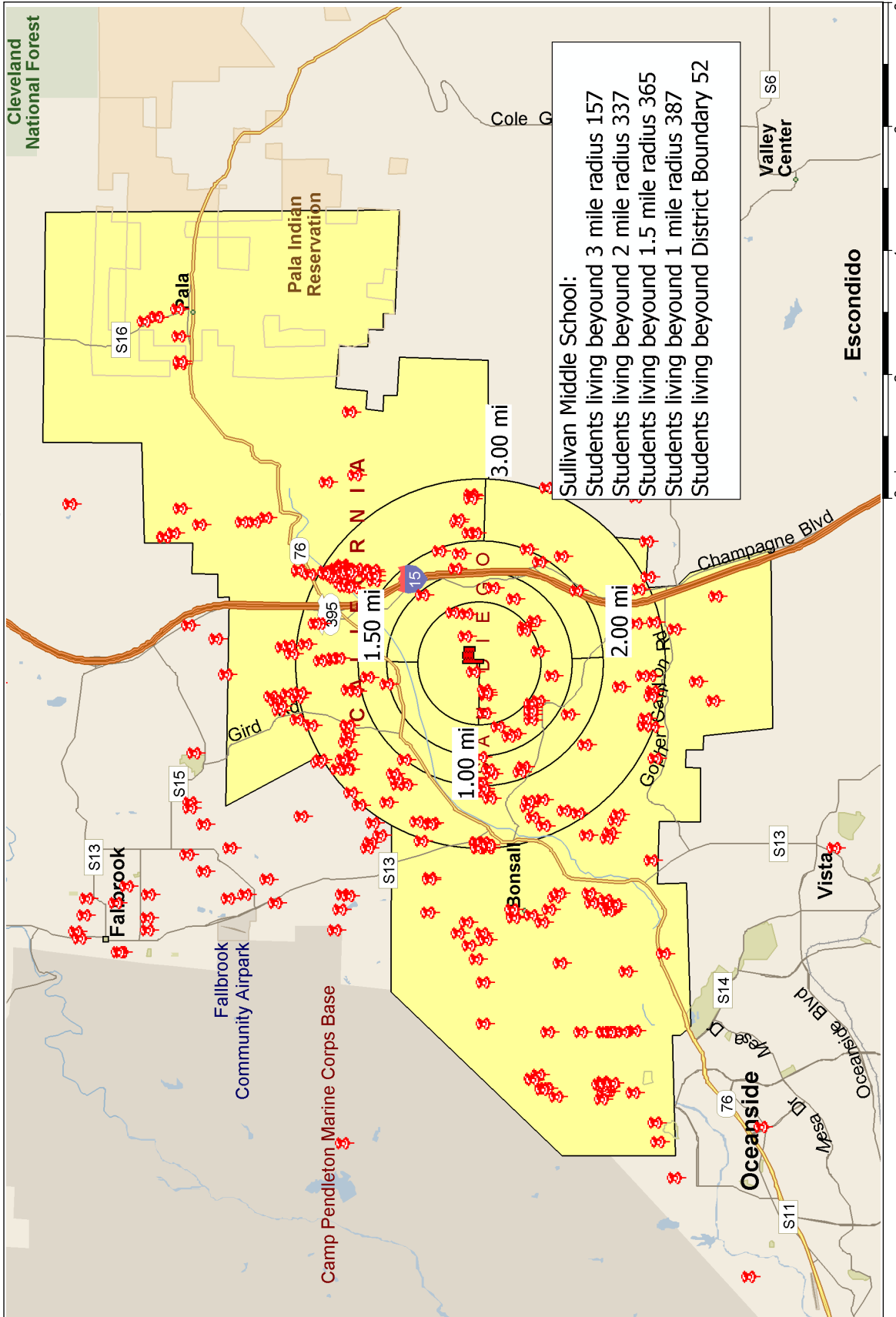
Bonsall West Elementary Map

Bonsall West Elementary:
Students living beyond 3 mile radius 16
Students living beyond 2 mile radius 37
Students living beyond 1.5 mile radius 52
Students living beyond 1 mile radius 109
Students living beyond District Boundary 35



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Sullivan Middle School Map



Sullivan Middle School:
 Students living beyond 3 mile radius 157
 Students living beyond 2 mile radius 337
 Students living beyond 1.5 mile radius 365
 Students living beyond 1 mile radius 387
 Students living beyond District Boundary 52

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FISCAL CRISIS & MANAGEMENT ASSISTANCE TEAM
STUDY AGREEMENT
January 4, 2008

The FISCAL CRISIS AND MANAGEMENT ASSISTANCE TEAM (FCMAT), hereinafter referred to as the Team, and the Bonsall Union School District, hereinafter referred to as the District, mutually agree as follows:

1. BASIS OF AGREEMENT

The Team provides a variety of services to school districts and county offices of education upon request. The District has requested that the Team provide for the assignment of professionals to study specific aspects of the Bonsall Union School District operations. These professionals may include staff of the Team, County Offices of Education, the California State Department of Education, school districts, or private contractors. All work shall be performed in accordance with the terms and conditions of this Agreement.

2. SCOPE OF THE WORK

A. Scope and Objectives of the Study

The scope and objectives of this study are to:

- 1) Conduct individual interviews and review job descriptions for the District Office staff including the Superintendent, Assistant Superintendent and six employees; interview school site and department administrators to confirm the level of customer service; evaluate the current distribution of workloads in order to confirm that appropriate segregation of duties and sound internal controls are in place; and provide recommendations for improvements in each area, as necessary.
- 2) Conduct an overview of the District's Transportation program and identify options and recommendations that if implemented, will enable the District to better control or reduce encroachment by 2009-10.

B. Services and Products to be Provided

- 1) Orientation Meeting - The Team will conduct an orientation session at the District to brief District management and supervisory personnel on the procedures of the Team and on the purpose and schedule of the study.
- 2) On-site Review - The Team will conduct an on-site review at the District office and at school sites if necessary.
- 3) Progress Reports - The Team will hold an exit meeting at the conclusion of the on-site review to inform the District of significant findings and recommendations to that point.
- 4) Exit Letter - The Team will issue an exit letter approximately 10 days after the exit meeting detailing significant findings and recommendations to date and memorializing the topics discussed in the exit meeting.
- 5) Draft Reports - Sufficient copies of a preliminary draft report will be delivered to the District administration for review and comment.
- 6) Final Report - Sufficient copies of the final study report will be delivered to the District following completion of the review.
- 7) Follow-Up Support – Six months after the completion of the study, FCMAT will return to the District, if requested, to confirm the District’s progress in implementing the recommendations included in the report, at no costs. Status of the recommendations will be documented to the District in a FCMAT Management Letter.

3. PROJECT PERSONNEL

The study team will be supervised by Anthony L. Bridges, Deputy Executive Officer, Fiscal Crisis and Management Assistance Team, Kern County Superintendent of Schools Office. The study team may also include:

- A. FCMAT Job Leader
- B. Two FCMAT Transportation Consultants

Other equally qualified consultants will be substituted in the event one of the above noted individuals is unable to participate in the study.

4. PROJECT COSTS

The cost for studies requested pursuant to E.C. 42127.8(d)(1) shall be:

- A. \$500.00 per day for each Team Member while on site, conducting fieldwork at other locations, preparing and presenting reports, or participating in meetings.
- B. All out-of-pocket expenses, including travel, meals, lodging, etc. Based on the elements noted in section 2 A, the total cost of the study is estimated at \$9,000. The District will be invoiced at actual costs, with 50% of the estimated cost due following the completion of the on-site review and the remaining amount due upon acceptance of the final report by the District
- C. Any change to the scope will affect the estimate of total cost.

Payments for FCMAT services are payable to Kern County Superintendent of Schools-Administrative Agent.

5. RESPONSIBILITIES OF THE DISTRICT

- A. The District will provide office and conference room space while on-site reviews are in progress.
- B. The District will provide the following (if requested):
 - 1) A map of the local area
 - 2) Existing policies, regulations and prior reports addressing the study request
 - 3) Current organizational charts
 - 4) Current and four (4) prior year's audit reports
 - 5) Any documents requested on a supplemental listing
- C. The District Administration will review a preliminary draft copy of the study. Any comments regarding the accuracy of the data presented in the report or the practicability of the recommendations will be reviewed with the Team prior to completion of the final report.

Pursuant to EC 45125.1(c), representatives of FCMAT will have limited contact with District pupils. The District shall take appropriate steps to comply with EC 45125.1(c).

6. PROJECT SCHEDULE

The following schedule outlines the planned completion dates for key study milestones.

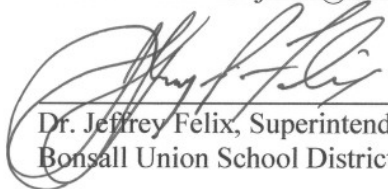
Orientation:	April 8, 2008
Staff Interviews:	April 8-9, 2008
Exit Interviews:	April 9, 2008
Preliminary Report Submitted:	May 23, 2008
Final Report Submitted:	to be determined
Board Presentation:	to be determined
Follow-Up Support:	If requested

7. CONTACT PERSON

Please print name of contact person: Dr. Jeffrey Felix, Superintendent

Telephone 760 631-5200m ext 101 FAX

Internet Address jfelix@sdcoe.net

 02/22/2008
 Dr. Jeffrey Felix, Superintendent Date
 Bonsall Union School District

 February 21, 2008

Barbara Dean, Deputy Administrative Officer Date
 Fiscal Crisis and Management Assistance Team

In keeping with the provisions of AB1200, the County Superintendent will be notified of this agreement between the District and FCMAT and will receive a copy of the final report.