



## **Heber Elementary School Distirct**

### **Maintenance, Operations and Transportation Review**

May 7, 2007





**CSIS California School Information Services**

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May 7, 2007

Jaime Silva, Superintendent  
Heber Elementary School District  
1052 Heber Avenue  
Heber, CA 92249

Dear Superintendent Silva,

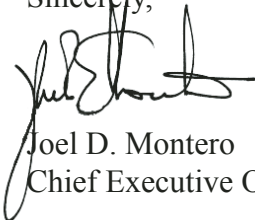
In January 2007, the Heber Elementary School District and the Fiscal Crisis and Management Assistance Team (FCMAT) entered into an agreement to provide a review of the district's maintenance, operations and transportation departments. Specifically, the agreement states that FCMAT will perform the following:

1. Conduct an efficiency review of the district's Maintenance, Operations and Transportation department and provide recommendations to increase operations to the level of standards identified within the industry, as necessary.

The attached final report contains the study team's findings and recommendations.

We appreciate the opportunity to serve you and we extend our thanks to all the staff of the Heber Elementary School District.

Sincerely,



Joel D. Montero  
Chief Executive Officer

**FCMAT**

Joel D. Montero, Chief Executive Officer

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# Foreword

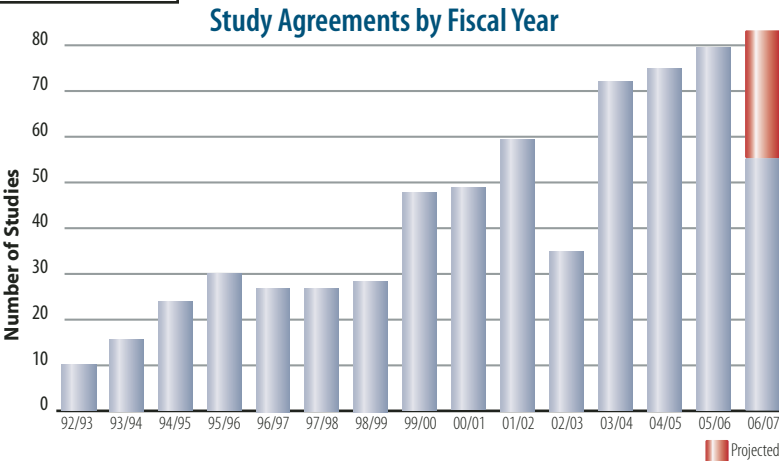
## FCMAT Background

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 more than 600 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.

<b>Total Number of Studies .....</b>	<b>637</b>
<b>Total Number of Districts in CA.....</b>	<b>982</b>
● Management Assistance.....	603 (94.66%)
● Fiscal Crisis/Emergency .....	34 (5.34%)
Note: Some districts had multiple studies.	
● Districts (7) that have received emergency loans from the state.	(Rev. 4/3/07)





# Introduction

## *Background*

The Heber Elementary School District is located in Imperial County, approximately 10 miles southeast of the city of El Centro. The district serves 890 students in kindergarten through grade eight at Heber Elementary School. Students are separated into primary and secondary classroom groups within the school, which has 37 full time teachers and eight part time teachers.

New housing developments under construction within the district’s boundaries will bring increased student enrollment and the need for additional transportation and facilities. A second elementary school is expected to open in two years. Additional staff will be needed to transport students to the new site, as well as to maintain and clean the school buildings, grounds and additional facilities.

The current staffing level in the district’s maintenance, transportation and grounds departments is insufficient to meet the upcoming needs. To plan for this future growth, the district superintendent contacted FCMAT to conduct a review of the districts maintenance, operations and transportation (MOT) department. Specifically, the scope and objectives of the FCMAT study are as follows:

1. Conduct an efficiency review of the district’s Maintenance, Operations and Transportation department and provide recommendations to increase operations to the level of standards identified within the industry, as necessary.

## *Study Team*

The study team was composed of the following members:

Barbara Dean  
Deputy Administrative Officer  
FCMAT  
Bakersfield, CA

Rip Courter, Ph.D.  
FCMAT Consultant  
Bonita, CA

Timothy Purvis\*  
Director of Transportation  
Poway Unified School District

John Lotze  
FCMAT Public Information  
Specialist  
Bakersfield, CA

\* As a member of this study team, this consultant was not representing his employer but was working solely as an independent contractor for FCMAT.

## *Study Guidelines*

The study team visited the district on March 1, 2007 to interview district employees, review documents, and collect information. This report is the result of that effort and is divided into the following sections:

- I. Executive Summary
- II. Department Structure, Staffing and Assignments
- III. Maintenance Work Orders
- IV. Custodian Workloads and Cleaning Standards
- V. Groundskeeping
- VI. Fleet Maintenance
- VII. Transportation Policies and Operating Procedures
- | VIII. Staff Training and Professional Development

## Executive Summary

The district's Maintenance, Operations, and Transportation (MOT) department is staffed by three full time employees, each of whom is assigned to drive bus routes during the day. Transporting students on time to and from Heber Elementary school and to El Centro for special education classes is given priority; other assignments are completed as time permits. This results in less time to perform other necessary transportation, facilities, and grounds duties.

The classification and job description for the Head of Maintenance, Operations, and Transportation position does not reflect the duties and responsibilities necessary to appropriately manage the MOT department. The district should consider reclassifying this position to Supervisor of MOT through traditional personnel and collective bargaining processes.

The head of MOT currently drives a bus and trains bus drivers. The district should consider removing these duties from the Head of MOT position's responsibilities as part of the reclassification process so that the position can focus more on supervisory functions.

The job description for the Skilled Maintenance position should also be revised to reflect current duties.

The current MOT staffing level is below industry standards and below what is needed to perform the total maintenance, custodial and grounds work that the district requires. The district should consider hiring a part time employee to assume the bus driving duties currently performed by the head of MOT. This part time position could be increased to full time, with its duties expanded to include additional maintenance and grounds tasks, when the second school site is opened.

The maintenance work order system lacks a means to establish priorities and should be revised to give priority to health and safety issues, as well as to document material and labor closeout costs. The head of MOT should meet weekly with the principal of Heber Elementary School to discuss completed and pending work orders.

The cleaning assignments of the custodial staff are excessive. The district should consider increasing each of the two five-hour per day cleaning positions to eight hours per day. Although this change would still leave the total custodial staff hours at eight hours less than the California Association of School Business Officials' (CASBO) formula recommends, it would likely improve the cleaning of classrooms and other buildings. The district should also implement cleaning standards that encourage students, teachers and custodians to share the responsibility for keeping their school clean.

The Maintenance/Grounds/Transportation position does not have sufficient time to maintain grounds and landscaping. The district should consider adding a second part time driver position to allow the existing position to spend more time working on grounds and

landscaping. Landscaping work should be prioritized, and tools and equipment should be evaluated for functionality. The manual irrigation system should be replaced with an automated system. Furniture and miscellaneous items stored in the “bone yard” at the warehouse should be disposed of or sold at auction. The books and classroom materials stored between the bus stalls in the warehouse should be removed, and the district should evaluate the hazardous material stored in the warehouse.

The district does not currently have a formal training program or schedule for MOT employees. The district should establish a formal training program that includes regular in-service training for all MOT staff and supervisors in areas related to their responsibilities to enable the department to increase operations to industry standard levels. The district should also consider giving the bus driver instructor responsibilities currently performed by the head of MOT to one of the other school bus driver employees, along with appropriate training for this task. FCMAT believes that all current employees are capable of achieving industry standard levels of service once appropriate training and realignment of work hours and duties is completed.

All major bus and vehicle maintenance is contracted out to a single provider. The district should implement annual bidding or secure competitive quotes for this service, and implement a manual or electronic work order process to track costs, repair data, vehicle histories and other information. If an electronic system is chosen, the district should consider a comprehensive system that also includes the ability to track work orders for maintenance of grounds and facilities. In addition, the district should conduct its own school bus safety checks to ensure legal compliance; all bus drivers should be trained in these and other maintenance procedures.

The district provides transportation to all students and does not have board policies or documented procedures regarding transportation service boundaries and other standard transportation safety and operational procedures. These policies should be established to mitigate the potential for general fund contributions to the transportation budget in the future, to ensure the use of best practices, and to comply with statutory requirements.

## Findings and Recommendations

The Maintenance, Operations, and Transportation (MOT) department is staffed by three full time employees assigned to the following positions: Head of Maintenance, Operations, and Transportation; Skilled Maintenance; and Maintenance/Grounds/Transportation.

Each employee drives assigned bus routes during the day. As is common in small districts, other responsibilities are also included in employees' job descriptions. Transporting students on time to and from Heber Elementary school and to El Centro for special education classes is given priority; other assignments are completed as time permits. This results in less time to complete other necessary transportation, facilities, and grounds responsibilities.

### *Department Structure, Staffing and Assignments*

The head of the MOT department reports directly to the superintendent, and typically receives direction from the superintendent, the business manager and the principal of Heber Elementary School. However, the job description states that the head of MOT "reports directly to the Superintendent, Assistant Superintendent and Accounting Supervisor."

The head of MOT reports to work at 7:30 a.m. and performs supervisory functions or provides needed assistance at the elementary school until 10:15 a.m. After a one hour lunch, this employee serves as a bus driver for afternoon transportation runs within the district or to transport special education students from El Centro. The skilled maintenance and maintenance/grounds/transportation employees serve as bus drivers for both morning and afternoon runs, and perform the other responsibilities of their positions during the remainder of their work day. The skilled maintenance employee has three hours per day to perform maintenance duties. The grounds employee has five hours and 15 minutes per day to perform groundskeeping duties. However, all three employees are frequently pulled from their non-transportation duties to respond to emergencies or urgent needs at the school site. This situation is exacerbated by the fact that the first custodian does not report to the school site for his eight-hour shift until 1:30 p.m.

Because the head of MOT supervises and evaluates the MOT staff, the title of Supervisor of Maintenance, Operations, and Transportation would be more suitable for this position. The current assignment of the head of MOT to bus driving duties for five hours and 15 minutes of each day is not cost effective and is an inefficient use of his time. This employee is not available to perform the primary functions for which he was hired. Hiring a part time bus driver to perform these bus driving duties would eliminate this inefficiency. The new part time driver position could be increased to a full time position with split responsibilities, such as half time school bus driver and half time maintenance

and operations, when the second school site is opened. This would address additional facilities and groundskeeping needs.

The job description and classification of the Head of MOT position needs to be revised to include supervisory duties for the maintenance, operations, and transportation departments. Including duties specific to supervising a school pupil transportation program will help the district achieve industry best practices in the area of transportation. The head of MOT's current responsibilities include ensuring that the Title 13 Motor Carrier required school bus safety checks are performed; overseeing an effective vehicle preventive maintenance program; ensuring that the Department of Motor Vehicle (DMV) and California Highway Patrol (CHP) requirements for licensing and training school bus drivers are in place; and ensuring that best practices established by the California Department of Education (CDE) School Transportation Unit are implemented.

The Skilled Maintenance position spends approximately half of the work day as a bus driver and performing related transportation vehicle maintenance duties and school bus safety check inspections. However, the job description for this position does not properly stipulate the training required for the school bus driver and vehicle maintenance functions. Appropriate training needs to be provided immediately in the area of school bus air brake inspection and adjustment, and the proper certification of completion needs to be maintained on file. Industry standards for such training can usually be secured by contacting any major brake manufacturer.

Proper training, compliance and certifications should be in place to prevent liability arising from student injury as a result of faulty or improperly maintained school bus air braking systems. FCMAT did not inspect the mechanical condition of the district's buses; therefore, this statement is provided only as a general reminder regarding preventive maintenance general liability.

The job description for the Maintenance/Grounds/Transportation position needs to be changed to better reflect the non-driving transportation duties performed, including school bus safety inspections. A more clear and systematic approach to monitoring the Motor Carrier Title 13 requirements for an effective school bus safety check program can ensure that the district meets its legal obligations for the 45-day/3,000 mile school bus safety checks.

When the new school opens, a greater degree of facility management will be needed. Changing staff assignments as suggested will prepare the district to better meet the needs of current and future students and school sites.

## ***Recommendations***

*The district should:*

1. Consider reclassifying the Head of Maintenance, Operations, Transportation position and changing the title to Supervisor of Maintenance, Operations, and Transportation, with an appropriate job description and salary structure. This would include removing the current responsibility for driving scheduled bus routes and for bus driver training. The reclassification process should follow all required personnel and collective bargaining procedures.
2. Redirect the reporting responsibility so that the Supervisor of MOT position reports to the district's business manager. Ensure that the supervisor of MOT, the business manager and the superintendent meet biweekly to plan.
3. Consider hiring a part time school bus driver as soon as possible and increasing the position to full time as a shared position with school bus driver and maintenance/operations duties when the second school site is opened.
4. Review and update the job descriptions for Skilled Maintenance and Maintenance/ Grounds/Transportation to reflect the maintenance, operations and transportation functions that these assignments include.
5. Immediately provide the skilled maintenance employee with training in school bus air brake inspection and adjustment, and keep on file the certification of completion for this training.

## *Maintenance Work Orders*

The district uses a manual work order system whereby a work order request is submitted by a teacher or staff member, approved by the principal and submitted to the maintenance department. The work order request provides a description of the work to be done and the approval process. The system is acceptable, but the work order should also include a record of the completion of the request and identify the material and labor costs.

There is no system for establishing the priority of work orders and their completion. Items related to health and safety of students and staff should be given the highest priority. The work order request form should include a checkbox identifying health and safety concerns. In addition, the principal of Heber Elementary School should be provided with regular updates on the status of completed and pending work orders. A weekly meeting between the head of MOT and the principal could reinforce communications and ensure that all work orders are addressed in a timely manner.

Before purchasing supplies to execute a work order, the head of MOT must contact and receive purchase approval from the business manager. For large expenditures, this procedure is necessary to maintain an appropriate level of internal control; however it is inefficient for small purchases. A common practice among similar school districts is to establish an open purchase order with a local supplier, with department limits of \$1,000 each for maintenance, operations, and transportation. This would provide the MOT department with the flexibility to purchase supplies and complete repairs faster and more efficiently. The El Centro Elementary School District and the Calexico Unified School District reportedly use an open purchase order system in their MOT departments.

The job description for the Skilled Maintenance position does not reflect the actual duties performed by this position, which include spending approximately one half of the work day driving a school bus and performing vehicle maintenance duties, including school bus safety checks.

### ***Recommendations***

*The district should:*

1. Modify the maintenance work order request form to include lines for the completion of the request as well as documentation of material and labor costs.
2. Create a formal system for prioritizing work order completion, and include a check box on the work order for indicating safety and health issues.
3. Institute a weekly meeting between the head of MOT and the principal of Heber Elementary School to brief the principal on pending and completed work orders.
4. Consider setting up an open purchase order for supplies, with three lines of \$1,000 each for the maintenance, grounds and custodial departments.

## Custodian Workloads and Cleaning Standards

The Heber School District’s facilities are comprised of nine separate sets of buildings encompassing 80,876 square feet. This includes 63 classrooms, offices, a library, a cafeteria, a kitchen, storage areas, a warehouse and 19 restrooms. To facilitate cleaning, the campus is divided into the following three areas:

Area one is comprised of rooms 206, 207, 208, 212, 213, 214, 302-322, the cafeteria, the district office, the superintendent’s office and one restroom. This area is 30,053 square feet and is the responsibility of one eight-hour per day custodian.

Area two is comprised of rooms 201-203, 205, 215, 216, 219-224, 227-236 and four restrooms. This area is 25,549 square feet and is the responsibility of one five-hour per day custodian.

Area three is comprised of rooms 103-107, 111, 112, 118-123, C lab, the principal’s office, the teachers’ lounge, the primary office and nine restrooms. This area is 19,274 square feet and is the responsibility of one five-hour per day custodian.

The warehouse facility is 6,000 square feet with 1 restroom. No one is assigned to clean this facility. The district has a total of 18 assigned hours of custodial service per day to clean 80,876 square feet of school facilities.

The California Association of School Business Officials (CASBO) has established a formula for determining custodial staffing requirements. This formula is based on adequate custodial staffing levels for schools throughout California. The formula includes one custodian for every 13 teachers (teacher factor), one custodian for every 325 pupils (pupil factor), one custodian for every 15 rooms to be cleaned (room factor), and one custodian for every 18,000 square feet of building area (square foot factor). The sum of these factors is divided by four to determine adequate staffing levels. Applying the CASBO formula to Heber Elementary School District’s facilities involves the following calculations:

88 Rooms	divided by 15	=	5.866
41 Teachers	divided by 13	=	3.153
889 Students	divided by 325	=	2.735
*78,876 Sq. Ft.	divided by 18,000	=	<u>4.382</u>
	Subtotal	=	16.136
	divided by 4	=	4.03 full time equivalent custodians

\*The cafeteria was not included in the calculation because it is cleaned by the food service staff.

The CASBO formula suggests that 32 hours per day of custodial services are needed to adequately clean the district’s facilities. The district has allocated 18 hours of custodial services. During interviews, the district’s custodial staff indicated that they cannot per-

form all of their assigned cleaning duties in the time allotted. It was reported that staff often voluntarily stay for up to two hours after the end of their work day to get the work done.

In response to staff concerns regarding the adequacy of the cleaning in school classrooms and general use areas, the principal has initiated a check-off sheet on which teachers can report to him areas of their rooms which were overlooked. The principal gives these check-off sheets to the head of MOT, who then gives them to the appropriate custodian for follow-up the next day. This process is commendable, but is based on the premise that only the custodians are responsible for classroom cleanliness. The custodians are caught between not having enough time allotted to clean the facilities effectively and meeting the expectations of school staff and students. The custodians appear to be overwhelmed; as a result, they are unable to complete all of their cleaning responsibilities.

Many school districts have taken the position that it is everyone's responsibility to create a positive, clean, safe and comfortable environment for students and staff. Adopting practices that include sharing cleaning responsibilities among students, teachers and custodians would help improve conditions at the district. Appendix A of this report includes a list of recommended cleaning responsibilities for students, teachers and custodial staff.

### ***Recommendations***

*The district should:*

1. Consider increasing the two five-hour per day custodian positions to full time, resulting in a total of 24 hours of daily custodial time to clean the school buildings and offices. This would be an improvement in the amount of time allocated for custodians, although the total custodian FTEs would still fall below the number suggested using the CASBO formula.
2. Establish formal procedures for pre-approval of custodial overtime, and budget for the additional expense as needed.
3. Establish cleaning standards that share cleaning responsibilities among the students, teachers, and custodial staff.

## *Groundskeeping*

The district sits on 16.77 acres of developed and undeveloped land. The grounds are composed of a lawn area; a main soccer field; basketball courts; a kid builder play area; graded dirt, gravel and asphalt parking areas; and undeveloped land with native plants. The site is fenced with wrought iron or fabric fencing. The fabric fence to the rear of the school tends to catch trash and paper and is an eyesore. The site has approximately 60 trees which must be maintained and are in need of trimming.

The irrigation system has been installed in phases with irrigation controls in various locations, including above ground, preventing the most efficient use of the area. Situating all the controls and irrigation heads below ground, placing the controls in a single central location and placing timers on controls that are currently operated manually would maximize efficiency and allow students maximum use of the area.

The warehouse “bone yard” contains salvaged furniture and miscellaneous unused items that should be disposed of or sold at auction. In the warehouse building, classroom books and materials located between the bus parking stalls should be removed and disposed of or properly stored.

Some gardening equipment may not be properly secured, and some are too old to be useful. At the time of FCMAT’s visit, the gas trimmer and mower were not operational. Gardening equipment such as the lawnmower, weedwacker, and other tools need to be maintained and properly secured. Equipment that is beyond its useful life should be disposed of or sold as surplus. In addition, some hazardous materials in the warehouse may not be stored properly. Hazardous materials should be evaluated to ensure that requirements for proper storage are being met.

The Maintenance/Grounds/Transportation position has approximately five hours per day to perform groundskeeping duties but reports that he is routinely called away from this assignment to respond to emergencies on the site, as well as to help complete maintenance work orders. Although there are no established standards for groundskeeping, In Even with work priorities in place, it is FCMAT’s opinion that 16.67 acres of grounds warrants one FTE groundskeeping position.

**Recommendations**

*The district should:*

1. Consider revising the current maintenance/grounds/transportation position to 1.0 FTE groundskeeper and adding a second part time bus driver position to complete the route currently being driven by the maintenance/grounds/transportation employee.
2. Set priorities for the lawn mowing and pruning tasks of the maintenance/grounds/transportation position to ensure the least amount of disturbance during the instructional day.
3. Evaluate groundskeeper tools and equipment to ensure that all are in working order.
4. Replace manual controls on irrigation systems with an automated system.
5. Evaluate furniture and miscellaneous items in the bone yard, and dispose of or sell surplus items.
6. Remove books and classroom materials from between the warehouse bus stalls.
7. Evaluate storage of hazardous material in the warehouse area to ensure that legally required procedures are in place.

## *Fleet Maintenance*

The district currently contracts with a private contractor for all major vehicle repairs. Given the small size of the district's fleet and the level of heavy duty gasoline and diesel engine experience needed to perform repairs, this practice is in the district's best interest. However, a brief review of the district's fleet maintenance records identified deficiencies in vehicle repair tracking from inception through completion. A clear and well documented paper or electronic service/repair work order system needs to be implemented to ensure appropriate oversight of a sole source contact. In addition, soliciting bids or gathering three quotes annually from local providers could help ensure that all services, parts and labor charges are appropriate.

Implementing its own Title 13 recommended preventive vehicle maintenance schedules would help the district ensure that it is not under- or over-maintaining its vehicles. Implementing a systematic approach can ensure that ongoing safety checks occur at 45 day/3,000 mile intervals as required. The district's current process of listing buses with their current mileages and calendar due dates on a white board in the garage area does not provide external notification of needed maintenance. If Title 13 requirements are not completed within the required intervals, illegal operation of school buses could occur. The district's fleet is small enough to allow manual tracking of intervals; however, inexpensive and user-friendly software is available to allow electronic tracking.

The security and inventory of school bus parts is lacking and needs greater attention and accountability. In addition, MOT personnel do not always secure the MOT facility when all personnel are away. Miscellaneous items stored in the MOT facility are not organized, and books and classroom materials are stored between the bus stalls. It does not appear that a central location for storing tools and spare parts has been identified or secured.

Optimal organization of the MOT facility will facilitate district transportation operations, provide for the protection and maintenance of fleet vehicles, and allow proper storage and inventory of assets and the elimination of surplus property.

**Recommendations**

*The district should:*

1. Solicit for an annual bid, or secure three quotes, for service and repair of district buses and other vehicles.
2. Implement a manual or electronic vehicle work order process to ensure that all repairs, costs, and parts are tracked appropriately and included in vehicle histories, and that completed work is verified.
3. Develop and implement a 45 day/3,000 mile school bus safety check process to ensure and document compliance with Title 13 requirements.
4. Include school bus safety check and vehicle maintenance responsibilities in the job descriptions of all bus driving positions in the MOT department.
5. Ensure that regular vehicle maintenance in-service trainings on maintenance and service functions such as school bus air brake systems, safety check processes and preventive maintenance schedules are completed and documented.
6. Consider purchasing and installing low cost industry-specific vehicle maintenance work order software to help maintain vehicle maintenance records, track repairs and preventive maintenance, and monitor the required school bus 45 day/3,000 mile safety checks.
7. Ensure that inventories of school bus parts are secured, that the MOT facility is locked when personnel are away, that miscellaneous items stored in and outside of the facility are organized or disposed of as needed, and that the books and classroom materials stored between the bus stalls are removed. Tools and spare parts should also be organized in a central and secure location.

## *Transportation Policies and Operating Procedures*

Board policies, operating policies and administrative procedures are needed to provide eligibility guidelines for transportation and non-transportation boundary areas within the Heber community. In addition, documented administrative procedures are needed regarding driver visibility; school bus stop identification and placement; routing; fleet maintenance procedures; student school bus safe riding guidelines and discipline referral processes; and school bus operator requirements. These items comprise some of the best practices followed by pupil transportation operations in most school districts.

The district is not currently experiencing a contribution from the general fund for regular or special education transportation expenses. However, because the district does not have board policies regarding transportation, the practice of providing transportation to all students could subject the district's budget to unwarranted and unfunded regular education transportation expense in the future. Because school districts are not required by the state to provide regular education transportation services, most do not receive full funding for transportation. Many districts must make general fund contributions to their transportation programs to offset excess costs. As a result, most school districts establish board policies and administrative operating procedures regarding voluntary regular education transportation as well as required special education transportation, which is determined by special education students' Individualized Educational Plans (IEPs). Effective board transportation policies and administrative procedures clearly delineate student transportation zones, which are usually established by mileage measurements or radius measurements within a school boundary.

### *Recommendations*

*The district should:*

1. Create school board policies, operating policies and administrative procedures to ensure the efficient operation and use of the district's school buses and appropriate control and management of the transportation budget.
2. Ensure that all pupil transportation operating policies and procedures required by the CDE are in place and followed.

## *Staff Training and Professional Development*

Although the head of MOT has been employed by the district for approximately 10 years, it appears that he has attended only one formal training program: school bus instructor training. A wide array of responsibilities and initiatives are associated with the duties of a MOT supervisory position, from leadership to safe handling of hazardous materials and many other areas. An employee is not able to perform these functions to the best of his or her ability without being exposed to basic knowledge and new trends in these key areas.

An effective formal training program for the head of MOT would include training in leadership, progressive discipline, communications, safety, hazardous materials, transportation of handicapped students and other topics. Programs operated by the California Association of School Business Officials (CASBO) and by the Imperial and San Diego county offices of education, as well as contact and interaction with peers, can also provide opportunities for learning. In addition, the Transportation Administrators Course sponsored by the CDE's School Transportation Unit should be considered. This course focuses on administrative and supervisory functions in a pupil transportation program.

School bus driver training is currently provided by the head of MOT. Because the bus driving staff is small, the duties of a state certified school bus driver instructor could easily be performed by one of the bus driver employees. This employee would be responsible for ensuring that any school bus driver candidate receives the necessary classroom and behind-the-wheel training, and for the required annual in-service training to maintain certification. In addition, this employee would be responsible for maintaining the necessary driving records, DMV record pull notice histories, commercial medical updates and DL-51 green cards.

Regularly scheduled training in vehicle maintenance, including specific maintenance and service functions such as school bus air brake systems, safety check processes and preventative maintenance schedules needs to be provided for all staff involved in these tasks.

**Recommendation**

*The district should:*

1. Establish a formal staff development and training program for all positions in the MOT department.
2. As recommended earlier in this report, ensure that the skilled maintenance employee receives training as soon as possible in school bus air brake inspection and adjustment.
3. Consider adding the school bus driver instructor and related responsibilities to one of the staff positions which have bus driving responsibilities.
4. Enroll the bus driver instructor employee in the CDE School Pupil Transportation Unit's school bus driver instructor course.
5. Ensure that all staff with school bus driving duties receive regular training in maintenance and service functions.



# Appendices

## *Appendix A*

*List of Recommended Cleaning Responsibilities*

## *Appendix B*

*Study Agreement*



## *Appendix A*

### *List of Recommended Cleaning Responsibilities*



## Sample Clean Schools List of Responsibilities:

It's our school, let's keep it clean. We all have responsibilities when it comes to creating a positive, clean, safe and comfortable environment.

### **Student Responsibilities (daily):**

1. Pick up litter and items on the floor in your area at the end of each class.
2. Put chairs on top of tables at the end of each day – last period.
3. Straighten chairs and desk rows at the end of each class.

### **Teacher Responsibilities (daily):**

1. Make sure that all computers and AV equipment are turned off and secured in a locked cabinet, if possible.
2. Shut and lock all windows, close curtains (if possible), turn off lights and make sure that the door is closed and locked.
3. See that sinks are clear at the end of the day.
4. Report any spills or special cleaning needs immediately to the custodian or the school office.

### **Custodial Duties (daily):**

1. Sweep, damp mop or dust mop tile floors (daily).
2. Vacuum every third day (elementary) and every two days (middle).
3. Dust level surfaces.
4. Spot clean doors (weekly).
5. Spot clean walls.
6. Clean sinks.
7. Erase the blackboard or whiteboard and clean chalk trays and erasers.
8. Empty trash cans.
9. Empty pencil sharpeners.

10. Spot clean desk tops as needed.
11. Double check classroom security.

*Appendix B*  
*Study Agreement*



FISCAL CRISIS & MANAGEMENT ASSISTANCE TEAM  
STUDY AGREEMENT  
February 15, 2007

The FISCAL CRISIS AND MANAGEMENT ASSISTANCE TEAM (FCMAT), hereinafter referred to as the Team, and the Heber Elementary 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 Heber Elementary 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 an efficiency review of the District's Maintenance, Operations and Transportation department and provide recommendations to increase operations to the level of standards identified within the industry, as necessary.

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.

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. Barbara Dean, FCMAT Deputy Administrative Officer
- B. Rip Courter, FCMAT Facility/Maintenance Consultant
- C. Tim Purvis, FCMAT Transportation Consultant

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 and the district's ability to support the cost of the study, total cost shall not exceed \$2,000. 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 identified not to exceed 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:

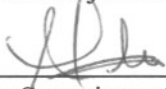
Orientation:	March 1, 2007
Staff Interviews:	March 1, 2007
Exit Interviews:	March 1, 2007
Preliminary Report Submitted:	April 12, 2007
Final Report Submitted:	To be Determined
Board Presentation:	To be Determined

7. CONTACT PERSON

Please print name of contact person: Jaime Silva, Superintendent

Telephone 760 337-6530 ext 2499      FAX 760 353-5338

Internet Address jaimes@heber.k12.ca.us

  
\_\_\_\_\_  
Jaime Silva, Superintendent      Date 2/22/07  
Heber Elementary School District

  
\_\_\_\_\_  
Barbara Dean, Deputy Administrative Officer      Date Feb 16, 2007  
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.