



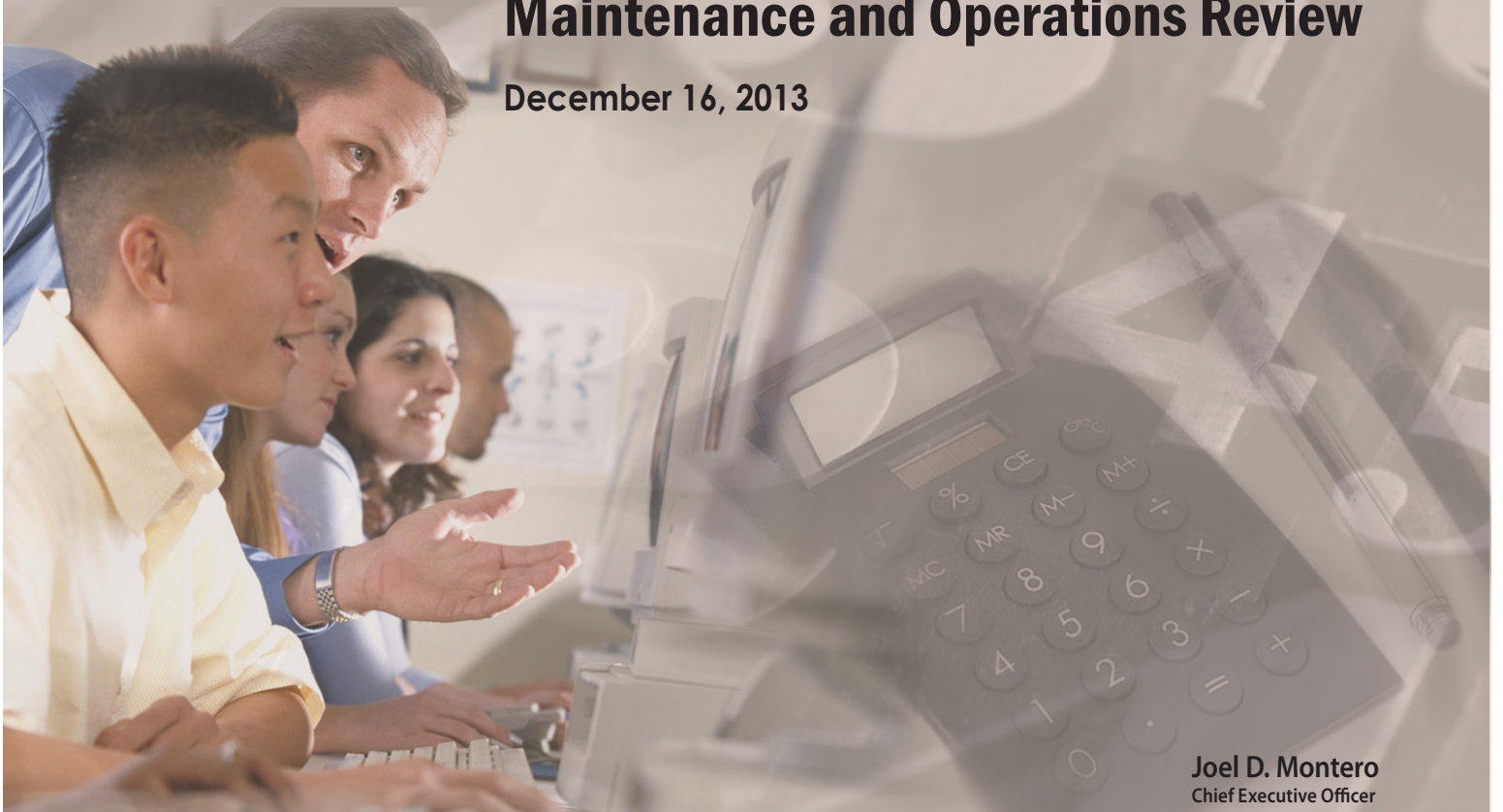
FISCAL CRISIS & MANAGEMENT
ASSISTANCE TEAM

CSIS California School Information Services

Beaumont Unified School District

Maintenance and Operations Review

December 16, 2013



Joel D. Montero
Chief Executive Officer





December 16, 2013

Maureen Latham, Ed.D., Superintendent
Beaumont Unified School District
350 Brookside Ave.
Beaumont, California 92223

Dear Superintendent Latham:

In April 2013, the Beaumont Unified School District and the Fiscal Crisis and Management Assistance Team (FCMAT) entered into an agreement to provide a review of the district's facilities, maintenance, grounds and custodial operations. Specifically, the agreement states that FCMAT will perform the following:

1. Conduct an organizational, staffing and efficiency review of the district's facilities, maintenance, grounds and custodial operations.
 - a. The team will provide comparative staffing data for districts of similar size and structure and make recommendations to improve operational efficiencies that may reduce district costs. The comparison will include at least three comparable school districts and may include those used in the district's collective bargaining process.
 - b. The team will review job descriptions for all department positions; evaluate capacity, scheduling, efficiency and functions; and make recommendations for staffing and operational improvements. All recommendations will include estimated savings or costs for any proposed position reductions or additions. This component will include interviews with district and site employees regarding the level of service the department provides.
 - c. The team will evaluate the operational work flow of each function for the facilities, maintenance, grounds and custodial department and make recommendations for improved efficiency and standard industry practices. This component will include the following:
 - i. Evaluate the district's comprehensive maintenance and deferred maintenance plans to support and provide preventive maintenance for all facilities, grounds, and the district's major facilities systems (HVAC, mechanical, plumbing, electrical, and structural).

FCMAT

Joel D. Montero, Chief Executive Officer

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- ii. Review the district's maintenance work-order system for repairs of facilities and equipment to ensure that all maintenance and repairs are completed in a timely fashion, and that work-order status reports are provided regularly.
- iii. Review the district's long-range facilities plan, and provide recommendations for staffing, if any.
- iv. Evaluate the grounds and custodial service plans for each site to ensure that the tasks and expectations for custodial and grounds employees are clearly outlined and indicate a detailed daily and periodic schedule for cleaning and simple repairs of the facilities. This will include the evaluation of the summer and non-school day programs for specialized cleaning and repairs.

This final report contains the study team's findings and recommendations in the above areas of review. FCMAT appreciates the opportunity to serve the Beaumont Unified School District and extends thanks to all the staff for their assistance during fieldwork.

Sincerely,

A handwritten signature in black ink, appearing to read 'Joel D. Montero', with a stylized flourish at the end.

Joel D. Montero
Chief Executive Officer

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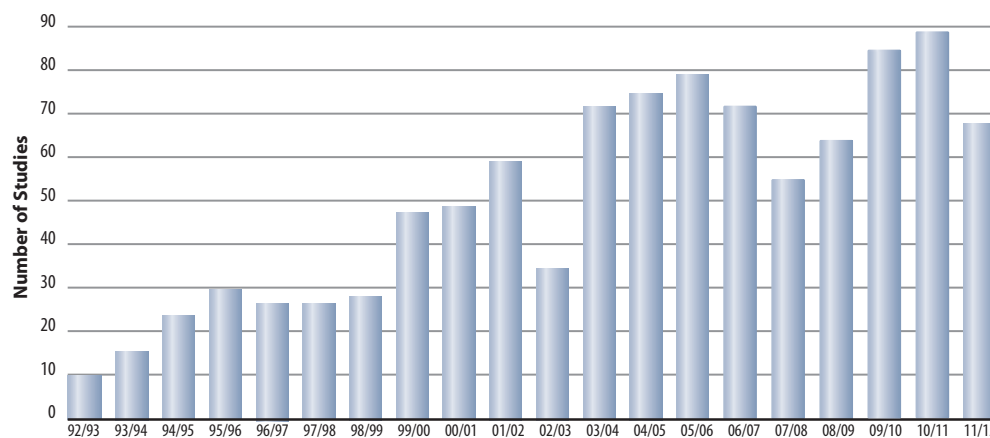
About FCMAT

FCMAT's primary mission is to assist California's local K-14 educational agencies to identify, prevent, and resolve financial and data management challenges. FCMAT provides fiscal and data management assistance, professional development training, product development and other related school business and data services. FCMAT's fiscal and management assistance services are used not just to help avert fiscal crisis, but to promote sound financial practices and efficient operations. FCMAT's data management services are used to help local educational agencies (LEAs) meet state reporting responsibilities, improve data quality, and share information.

FCMAT may be requested to provide fiscal crisis or management assistance by a school district, charter school, community college, county office of education, the state Superintendent of Public Instruction, or the Legislature.

When a request or assignment is received, FCMAT assembles a study team that works closely with the local education agency to define the scope of work, conduct on-site fieldwork and provide a written report with findings and recommendations to help resolve issues, overcome challenges and plan for the future.

Studies by Fiscal Year



FCMAT also develops and provides numerous publications, software tools, workshops and professional development opportunities to help local educational agencies operate more effectively and fulfill their fiscal oversight and data management responsibilities. The California School Information Services (CSIS) arm of FCMAT assists the California Department of Education with the implementation of the California Longitudinal Pupil Achievement Data System (CALPADS) and also maintains DataGate, the FCMAT/CSIS software LEAs use for CSIS services. FCMAT was created by Assembly Bill 1200 in 1992 to assist LEAs to meet and sustain their financial obligations. Assembly Bill 107 in 1997 charged FCMAT with responsibility for CSIS and its statewide data management work. Assembly Bill 1115 in 1999 codified CSIS' mission.

AB 1200 is also a statewide plan for county offices of education and school districts to work together locally to improve fiscal procedures and accountability standards. Assembly Bill 2756 (2004) provides specific responsibilities to FCMAT with regard to districts that have received emergency state loans.

In January 2006, SB 430 (charter schools) and AB 1366 (community colleges) became law and expanded FCMAT's services to those types of LEAs.

Since 1992, FCMAT has been engaged to perform nearly 850 reviews for LEAs, including school districts, county offices of education, charter schools and community colleges. The Kern County Superintendent of Schools is the administrative agent for FCMAT. The team is led by 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

Background

Located in Riverside County, the Beaumont Unified School District serves the city of Beaumont, which has a population of approximately 40,000. The district maintains more than 920,000 square feet of facilities and 200 acres of property, including six elementary schools, two middle schools, a comprehensive high school, a continuation high school, an adult school, and four district facilities.

The district has experienced consistent enrollment growth over the past decade, growing from less than 5,000 students in 2003 to more than 8,800 in 2013. Based on a recent demographic projection report, the growth is expected to continue and the forecast is that the district's enrollment will grow to approximately 10,200 students by the 2019-20 school year.

This growth, coupled with the passage of Measure Z in 2008, which authorized a \$125 million general obligation bond, resulted in a two-story building expansion at Beaumont High School, a theater remodel, a new sports complex, and two elementary school parking lot reconfigurations. Through a certificate of participation (COP) and the sale of land, the district also added new administrative offices and a maintenance and operations facility. These additions affect the delivery of the district's maintenance, operations, and grounds services. The district seeks to organize its facilities, maintenance, operations and grounds department to effectively and efficiently serve and maintain its property while providing high quality educational opportunities in a safe and secure learning environment.

In April 2013, the Beaumont Unified School District and the Fiscal Crisis and Management Assistance Team (FCMAT) entered into an agreement for FCMAT to provide a review of the district's facilities, maintenance, grounds and custodial operations. Specifically, the agreement states that FCMAT will perform the following:

1. Conduct an organizational, staffing and efficiency review of the district's facilities, maintenance, grounds and custodial operations.
 - a. The team will provide comparative staffing data for districts of similar size and structure and make recommendations to improve operational efficiencies that may reduce district costs. The comparison will include at least three comparable school districts and may include those used in the district's collective bargaining process.
 - b. The team will review job descriptions for all department positions; evaluate capacity, scheduling, efficiency and functions; and make recommendations for staffing and operational improvements. All recommendations will include estimated savings or costs for any proposed position reductions or additions. This component will include interviews with district and site employees regarding the level of service the department provides.
 - c. The team will evaluate the operational work flow of each function for the facilities, maintenance, grounds and custodial department and make

recommendations for improved efficiency and standard industry practices. This component will include the following:

- i. Evaluate the district's comprehensive maintenance and deferred maintenance plans to support and provide preventive maintenance for all facilities, grounds, and the district's major facilities systems (HVAC, mechanical, plumbing, electrical, and structural).
- ii. Review the district's maintenance work-order system for repairs of facilities and equipment to ensure that all maintenance and repairs are completed in a timely fashion, and that work-order status reports are provided regularly.
- iii. Review the district's long-range facilities plan, and provide recommendations for staffing, if any.
- iv. Evaluate the grounds and custodial service plans for each site to ensure that the tasks and expectations for custodial and grounds employees are clearly outlined and indicate a detailed daily and periodic schedule for cleaning and simple repairs of the facilities. This will include the evaluation of the summer and non-school day programs for specialized cleaning and repairs.

Study Guidelines

FCMAT visited the district on August 26-28, 2013 to conduct interviews, collect data and review documents. This report is the result of those activities and is divided into the following sections:

- Executive Summary
- Department Management
- Policies, Procedures and Standards
- Training
- Maintenance
- Grounds
- Custodial
- Facilities Department
- Staffing Comparisons
- Preventive Maintenance
- Electronic Work Order System
- Five-Year Deferred Maintenance Plan
- Communications, Purchasing and Inventory, Morale, Vehicles, and Facility Conditions
- Appendices

In writing its reports, FCMAT uses the Associated Press Stylebook, a comprehensive guide to usage and accepted style that emphasizes conciseness and clarity. In addition, this guide emphasizes plain language, discourages the use of jargon and capitalizes relatively few terms.

Study Team

The study team was composed of the following members:

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

Executive Summary

During the past 10 years the district has experienced enrollment growth and facility expansion, but also frequent changes in its top maintenance and operations staff, which has caused a lack of consistent leadership, resulting in a lack of established standards, procedures and accountability in the department. The district needs to reestablish controls in the department including providing standards and expectations for productivity and quality of services.

The district lacks policies and procedures manuals, which are needed to clearly define expectations and serve as a resource for staff and administrators. Standardized and routine training is also lacking and needs to be developed in conjunction with policies and procedures. This should include training relevant to accomplishing the tasks associated with employees' positions as well as safety training that is mandated and/or helps reduce safety related issues.

The district's maintenance staff consists of 10 maintenance employees who serve 10 sites. The eight daytime maintenance employees each claim an area of specialty in addition to a designated school site, while the two nighttime employees have general repair assignments. School sites request work via a work order system; however, the system is not used consistently or to its fullest and provides no accountability because work orders are self-assigned by staff and are not updated or closed regularly. Staff spend excessive time traveling between locations to address tasks within their area of specialty and do not efficiently address the needs of their assigned site or complete their other duties.

The district's groundskeeping staff consists of 10 groundskeepers and one mechanic, who are organized into two teams that travel from site to site and one staff member who is assigned to the high school. Daily work schedules were developed by the staff with some input from the interim director; however, the schedules do not define individual staff duties and provide no enforceable accountability. Acceptable standards need to be established and tasks designed to meet them. Time can then be assigned for each task and a schedule for each staff member and work team created, documented and enforced.

The district employs 31 custodial staff members, who work a variety of schedules at different locations, making it difficult to maintain accountability. Few work schedules are documented, and the district has not adopted a cleaning standard to set expectations. The custodial work is largely unsupervised, so cleanliness and productivity vary greatly.

Based on staffing comparisons with other districts and industry standards for maintenance, grounds, and custodial staffing, the district's staffing is higher than average in these areas. This indicates that the district either has higher expectations, is less efficient, or both. The comparisons further corroborate the need to implement standards, expectations and stronger accountability.

The district also needs more direct communication within the maintenance and operations department and between the department and the district's leadership; increased purchasing and inventory control; a vehicle and equipment replacement plan; and a more thorough process for inspecting and reviewing construction and repair projects before they are closed to ensure that they are completed to an acceptable level.

Findings and Recommendations

Department Management

During the district's enrollment growth and facility expansion over the past 10 years, the maintenance and operations department experienced frequent changes in its top administrative staff (director level), leading to a considerable lack of sustained leadership of and supervision over maintenance, groundskeeping and custodial staff. The district has had five different individuals in the director of maintenance and operations position over the past fifteen years, and this position is currently filled on an interim basis while the district is in the process of hiring a permanent replacement.

The interim director indicated that he is reluctant to give specific direction or initiate specific changes to daily individual work schedules because of his interim status; he feels that the district and the department's staff consider him a temporary employee. Many maintenance, custodial and grounds employees are not certain from whom to take direction and are reluctant to take any direction given as credible due to the frequent turnover. Staff have been deciding on their own what work they will perform on any given day.

The lack of consistent leadership includes a lack of established standards, procedures, and discipline, which has allowed the department's employees to determine their own working standards, schedules and operational procedures.

The district needs to find a more permanent solution for the director of maintenance vacancy as soon as possible, and the position needs to be given the authority and district backing to allow them to set expectations and administer accountability. Goals for the department need to be adopted by the board and communicated directly to all departmental employees in writing along with specific information regarding organizational structure and chain of command.

The lack of internal controls throughout the department, results in a lack of accountability, department inefficiencies, and an ineffective delivery of services. Managers need to establish controls designed to support a department in achieving its objectives and goals. These include hard controls such as standard operating procedures, work assignments, specific decision-making authority, procedural training and task completion verification; and soft controls such as management tone, performance evaluations, training programs, and service standards.

The district will need to establish minimum acceptable standards and desired expectations for both productivity and quality in the maintenance and operations department. Having these in place will allow management to monitor employees' work, develop and use performance evaluations, and determine the staffing required to maintain desired standards.

Recommendations

The district should:

1. Establish consistency in leadership by permanently filling the director of maintenance and operations position.
2. Establish minimum acceptable standards and desired expectations for both productivity and quality in the maintenance and operations department.

3. Establish hard internal controls in the department including standard operating procedures, work assignments, and task completion verification.
4. Establish soft internal controls in the department including management tone, performance evaluations, training programs, and service standards.
5. Adopt goals for the department and communicate them directly to all departmental employees in writing along with specific information regarding organizational structure and chain of command.

Policies, Procedures and Standards

The maintenance and operations department lacks documents that define and clearly communicate district policies, procedures, standards and expectations. Without this documentation, department staff and the department's customers will have varying expectations, making it difficult to fairly administer staff accountability.

Effective written policies, procedures, standards, and expectations will clearly define employee authorizations and expectations, and the standards of care for all facilities including frequency of services and expected response times for maintenance service. They will also align with the employees' rights and accountability standards; the personnel department is the best resource for helping ensure this alignment. It is best practice to develop and maintain a manual of these documents for staff to reference; effective manuals of this type include at least the following topics.

- Use of district vehicles
- Use of district tools and equipment
- Key control and reporting
- New employee and substitute orientation
- Acceptable employee conduct
- Employee discipline
- Employee evaluations
- Dress code/uniforms
- Work order assignment
- Inventory management and control
- Maintenance response time
- Work order communication processes
- Communication protocols between staff members
- Frequency of custodial cleaning for all facilities
- Frequency of all landscape maintenance
- Preventive maintenance items and schedules
- Purchasing authority

Once such a manual is implemented, it is best practice to review and revise it regularly as needed to ensure that it meets the needs of the district and aligns with the collective bargaining agreement and legally required changes. The manual should also serve as a basis for staff accountability and for evaluations.

Recommendations

The district should:

1. Develop and implement written district policies, procedures, standards and expectations for facilities maintenance, custodial, and grounds services.

2. Create a maintenance and operations department manual that addresses the topics needed to serve as a reference for staff and provide for accountability.
3. Review and revise policies, procedures, standards and expectations as needed, and update the department manual.

Training

The district lacks a formal training program for maintenance and operations staff. Staff indicated that over the past several years the maintenance and operations staff have not received regular or mandatory training and are out of compliance in a number of areas related to health and safety, such as blood-borne pathogen and material handling safety.

New employees and substitute employees are not receiving any initial or ongoing training relevant to their positions. Typically, the responsibility for ensuring that this training occurs lies with the director of maintenance and operations; the lack of training is most likely due to the inconsistency in that position.

The district needs to ensure that its personnel have been adequately trained. It would benefit the district to evaluate and identify the areas in which staff need additional training and knowledge, and schedule training to help staff improve in these areas. It is best to coordinate this training with annual mandatory safety and materials use training.

The director of maintenance and operations will need to develop a thorough, standardized and routine training program to bring the maintenance and operations department into compliance with federal, state and local safety regulations by ensuring that all mandated training is scheduled, takes place and is monitored. Initial and ongoing training for all maintenance and operations staff, including substitutes, should be a part of this program.

In addition, regular safety meetings for all maintenance and operations staff would help improve communication, promote education, and resolve issues as they arise. More in-depth safety and general training meetings could be scheduled for the summer when school is not in session. It is typically the director of maintenance and operations' responsibility to ensure that such training occurs.

An effective formal training program will include training on the following topics:

- Anti-microbial safety
- Blood-borne pathogens
- Material Safety Data Sheets (MSDS)
- Injury and Illness Prevention Program (IIPP)
- Respiratory protection
- Hand and power tool safety
- Back injury prevention
- Safe Work Practices
- Hazard communication plans
- Ladder safety
- Electrical safety
- Driver safety
- Specific safety procedures for each specialty work trade performed by district staff

The district has begun trainings for staff but has not organized or documented records of participation or completion. It is best practice to designate one employee to be responsible for

maintaining all employee records related to mandated safety and health training to ensure coordination and compliance.

Recommendations

The district should:

1. Develop a regular training program to provide mandatory safety and specialty training for current, new and substitute employees.
2. Regularly evaluate the district's needs and staff members' skills and knowledge to identify areas in which training is most needed. Provide specialized training in these areas.
3. Maintain complete records of training to ensure that all employees are trained and to assist with employee accountability.
4. Ensure that regular safety meetings for all maintenance and operations staff are held and documented.

Maintenance

The maintenance department serves 10 school sites and consists of one office clerical assistant, two maintenance I staff, three maintenance II staff, and five maintenance III staff.

The maintenance II and III staff members' workday is from 6 a.m. – 2:30 p.m. This maintenance and repair staff includes an individual responsible for each of the following areas:

- Electrical and irrigation
- Telephone and data wiring
- Asphalt and concrete special projects, bid packages, job walks and playground striping
- Keys and locks, welding, and serving as the integrated pest management (IPM) coordinator
- Carpentry, underground work and helping with plumbing
- HVAC and refrigeration, kitchen equipment, and fire alarm systems
- Cabinets and apprentice locksmith duties
- Plumbing

These eight maintenance staff have self-identified their areas of specialty or trade as well as general responsibility for certain needs of specific school sites, and they self-select which work orders they will complete daily. Once a job is completed, they mark the work order complete in the computer system.

The maintenance I staff members work as a team from 2:30 p.m. – 11 p.m. These two night maintenance personnel have general repair assignments and have not self-identified a maintenance or repair specialty. These two do not have computer access to select work orders for repair, and information provided to FCMAT indicates that they did not have any work orders assigned to them in the last few months. The night maintenance personnel have maintained their current work schedule for approximately four years. They were hired to provide maintenance service in the evening when students and staff are gone. In concept, this approach appears beneficial; however, it was reported that these positions spend much of their time tending to specific needs of parent and student organizations at the high school rather than on maintenance tasks. In addition, reports indicate that they spend a substantial amount of time helping the evening custodial staff as needs arise.

The lack of work orders and accountability for the two maintenance I staff members results in an ineffective and inefficient use of these positions. Both site and maintenance staff expressed the opinion that the evening maintenance schedule is not effective and lacks accountability. Revising the maintenance I staff members' schedules to 6 a.m. – 2:30 p.m. would improve productivity by allowing for increased supervision, greater accountability, and cross training opportunities.

The maintenance staff have delineated and self-assigned tasks and responsibilities based on the skills of each individual. The job descriptions for maintenance positions allow for movement between levels I, II and III if an individual acquires certain skills in the appropriate trade(s). However, this movement is not based on any objective criteria such as completion of a certification program, licensing, or attainment of Journeyman trade status. The job descriptions also do not specify which types of jobs a position or individual can complete.

The maintenance and operations staff have the perception that their department has insufficient staffing. FCMAT believes this perception exists because of inefficiencies from lost time due to travel between tasks and staff ignoring maintenance and repair tasks they consider outside of their skill set.

Establishing district standards for maintenance and operations tasks, as recommended above, would help alleviate this situation. In addition, it would benefit the district and department to ensure that expectations for maintenance and repair of the district facilities include service response times, work order progress and completion notification, as well as to maintain preventative maintenance schedules. Using these standards as a basis, the director can distribute work orders that are prioritized according to their urgency and staff availability.

The director's task is to determine the existing staff members' specific skills and experience so that when a specialty is needed the repair can be assigned to staff with the right skills. Larger repair or maintenance jobs such as heating, ventilation and air conditioning (HVAC) replacement, major underground plumbing or electrical, and fire alarm repairs or additions, may be accomplished in-house using a team of maintenance workers, or by outside vendors if district staff do not have the specialty knowledge or equipment needed. It is typically the director's responsibility to decide who will perform such projects and to manage them.

To ensure all repairs comply with local building codes and/or the standards of the Division of the State Architect (DSA) for jobs/projects that require certification from that office, the district should consider outside licensed contractors with specific experience in such school projects. Contracting out also provides the district with liability coverage in case errors in workmanship cause damage to facilities. The director should be responsible for overseeing bid packages, job walks and monitoring of outside contractors' performance to ensure that all work is satisfactory.

Recommendations

The district should:

1. Consider changing the maintenance I staff members' schedule to one that is similar to the other maintenance staff to allow for improved accountability and training.
2. Assess the skills and knowledge of each maintenance staff member.
3. Ensure that work orders are distributed efficiently after taking into consideration their urgency, staff abilities, and the best use of available resources.
4. Ensure that the expectations for maintenance and repair include service response times, work order progress and completion notification, as well as adherence to preventative maintenance schedules.
5. Consider outsourcing projects that require specialized knowledge and equipment.
6. Require the director to oversee bid packages, job walks, and monitoring of performance to ensure all work is completed to satisfaction.

Maintenance Job Descriptions

The district has job descriptions for three maintenance positions with the following titles: Maintenance Person I, Maintenance Person II, and Maintenance Person III. This is a common structure within a maintenance division the size of Beaumont Unified School district. It is most common to see this structure viewed and used to allow for progressive training, and it provides a well-balanced way to deliver efficient and effective maintenance services.

Typically, a maintenance person I is an entry level building maintenance position that requires general knowledge of various building trades and methods associated with the maintenance and repair of buildings. A maintenance person II position requires an employee to have a broad knowledge of various trades and greater skills in several different areas of building maintenance and repair. A maintenance person III requires the equivalent of journeyman-level experience and knowledge in several building trades.

The definitions, example duties, knowledge and abilities listed in the district's Maintenance Person I, II, and III job descriptions are very similar to each other. The most notable difference among them is that the Maintenance Person I description requires the ability to perform skilled work in at least one maintenance trade at the journeyman level; the Maintenance Person II description requires the ability to perform skilled work in at least two maintenance trades at the journeyman level; and the Maintenance Person III description requires the ability to work in at least three maintenance building trades at the journeyman level.

The district's current maintenance job descriptions do not accurately reflect the roles and responsibilities of the maintenance person I, II and III employees. The maintenance person I is required to pass a district-administered test with a score of 80% or higher. The maintenance person II is not required to pass a district-administered test, and the maintenance person III is required to pass a district-administered test with a score of 70% or higher.

The district's director of operations currently supervises the maintenance person I, II, and III positions. However, according to the job descriptions the maintenance person I is supervised by the maintenance/transportation and operations supervisor; the maintenance person II is supervised by the maintenance/transportation and operations supervisor, the lead maintenance/hazard/safety supervisor, and the maintenance person III; and the maintenance person III is supervised by the director of maintenance and operations. According to the job descriptions, the maintenance person I and II positions can also be supervised by the maintenance person III; however, the maintenance person III job description states that it supervises no employees. These inconsistencies create confusion in supervision and a lack of accountability.

The maintenance person III job description was last revised in September 2007, and the dates of the last revisions to the maintenance person I and II job descriptions are unknown; however, it appears that these two job descriptions were last revised several years before the maintenance person III job description revision.

It would benefit the district to have the director of maintenance and operations work with the personnel department to revise the maintenance person I, maintenance person II and maintenance person III job descriptions. The process used should align with the district's needs and collective bargaining parameters, and include research of typical school district maintenance department structures. The revised job descriptions will need to accurately reflect the roles, responsibilities and requirements of each of the employees in these classifications.

Recommendations

The district should:

1. Revise maintenance job descriptions to accurately reflect the district's needs, the supervision, and the duties to be performed.
2. Establish a process to periodically review and revise job descriptions to ensure that they align with organizational needs and legal requirements.

Grounds

Groundskeeping focuses on maintaining the district's property including lawns, athletic and play fields, and landscaping. Maintenance requirements for different properties vary widely, from labor-intensive planters to lawns and fields that require frequent attention, to natural settings that require only periodic upkeep. Success sometimes depends on uncontrollable factors such as weather, or the vulnerability of plants and pests. It also depends on well-equipped, knowledgeable and skilled personnel who can proactively identify issues and plan for needs before they get out of hand.

The district has 10 full-time employees dedicated specifically to groundskeeping duties. This consists of seven groundskeeping I positions, two groundskeeping III positions, and one groundskeeper IV position. In addition there is one grounds equipment mechanic and one full-time equivalent (FTE) position in the maintenance department that performs sprinkler maintenance.

The groundskeeping staff are organized into two teams, with the exception of one staff member who is assigned specifically to Beaumont High School and a grounds mechanic who works at the maintenance facility. The team work schedules were developed by the groundskeeping staff with some input from the interim director of maintenance and operations.

The district has no documented work schedules for individual groundskeeping staff. One staff member indicated that they have not had a specific weekly schedule for some time, and currently determines his own daily work schedule. Other staff members similarly indicated they were the only ones who knew their own work schedule, and that they had never been provided with a work schedule from the district or a supervisor. It is impossible for district administrators to set expectations and maintain accountability without a documented work schedule.

Due to the lack of a work schedule, the incoming director of maintenance and operations will need to evaluate the time required to perform essential groundskeeping tasks for each site, and then develop individual daily or weekly work schedules for the groundskeeping staff. The evaluation will need to analyze the weekly, monthly and annual groundskeeping needs of each site, and schedules will need to be developed for each site to meet those needs. Tasks and the time it takes to complete them will need to be identified. The tasks can then be organized and assigned to individual groundskeepers. Individual work schedules should be balanced and developed based on industry standards for productivity and not on individual employee capabilities. Each work schedule needs to be documented, given to the employee, and used for accountability and evaluation of individual employee performance.

It is also a best practice to identify specific supervisory roles for each team of groundskeepers. Bargaining unit employees should not supervise and/or evaluate the work of other bargaining unit members, so it is essential to identify an individual in a supervisory position to serve as supervisor. Bargaining unit employees may work alongside other more skilled employees to help them learn and develop their skills. Individuals on each grounds team can also be trained and given the parts and tools needed to perform simple irrigation repairs and adjustments.

In addition to individual work schedules, the district also lacks work standards and expectations for groundskeeping. These standards should specifically identify the level of performance the district expects. These standards need to be developed with the participation of the district's executive management and should include input from the school board. It is best to develop

these standards before creating departmental work schedules so that those schedules can include adequate time to complete the tasks the standards require.

With regard to seasons and calendar requirements, it is best practice to have work standards that cover the following:

- Lawn care including mowing frequency, edging and trimming frequency, reseeding, aerating, and fertilizing frequency, and special attention to the needs of playfields
- Low-maintenance grounds including weeding and ground clearance
- Planters and planter boxes
- Flower and shrub beds
- Hedges and bush trimming
- Tree trimming
- Pest management

These and any other district-level concerns or priorities need to be identified and addressed when developing groundskeeping standards. Staff training may be needed for their successful implementation and should be included in the planning.

Recommendations

The district should:

1. Develop and adopt expectations and written standards for grounds appearance and maintenance.
2. Establish team work schedules that provide for the district standards to be met weekly, periodically and seasonally.
3. Establish individual task schedules within the team work schedule to provide an equitable distribution of work and to establish accountability.
4. Ensure that staff training is provided to promote implementation of the grounds procedures.

Grounds Job Descriptions

The district has job descriptions for only three positions in the groundskeeping department: grounds person I; grounds person III; and grounds equipment mechanic. The job descriptions for the groundskeeper I and groundskeeper III positions are almost identical, with the exception of a couple of sentences in the Groundskeeper III job description that indicate they “must be able to work from sketches or blueprints, keep good records, supervise Groundskeeper I and II positions”, and “take direction from the Maintenance Director” (as opposed to direction from the maintenance supervisor as indicated in the job description for the Groundskeeper I).

The job description for the grounds mechanic position is up-to-date and accurate with regard to the work being performed. The job descriptions for the groundskeepers have not been updated since 1994 and are outdated. All groundskeeper job descriptions include sprinkler repair, yet not

all the groundskeepers have been trained or instructed to perform these tasks; instead, a member of the maintenance team has been identified to perform this work.

The district will need to revise and update both the groundskeeper I and III job descriptions to include current tasks. If groundskeeper II and IV positions are desired, job descriptions will need to be developed. Job descriptions should list the current tasks that are expected to be performed, with clear distinctions in tasks for the various grounds positions.

The revised job descriptions will also need to indicate who will evaluate each position. The district should develop a process to regularly review the job descriptions to ensure that they meet the district's needs and adhere to industry best practices.

Sprinkler repair

One staff member in the maintenance department is identified as a “sprinkler technician.” This staff member is not a member of the groundskeeping staff yet performs a groundskeeping function. If this staff member is mainly responsible for maintaining sprinklers and the irrigation system, then this responsibility needs to be identified in their daily work schedule, and their position reassigned or reclassified as a member of the groundskeeping staff.

Members of the groundskeeping staff indicated that they were not certain who has the main responsibility for maintaining and repairing sprinklers. Although only one individual is designated to perform this task, some groundskeepers have attempted to repair broken sprinklers because the assigned individual did not have the time to do so and lawns were dying.

Further, although sprinkler repair is listed in all groundskeepers' job descriptions, none have received training in repair or maintenance of sprinkler and irrigation systems. The district needs to identify one or two additional staff members to be responsible for sprinkler and irrigation system maintenance and provide them with the materials and training needed for this.

Recommendations

The district should:

1. Review, revise, and update grounds job descriptions to include the district's current needs and expectations.
2. Develop a job description for a groundskeeper II if the position is needed or anticipated and for the groundskeeper IV position.
3. Devise a schedule to review and revise job descriptions to ensure that they are current and accurate.
4. Provide ongoing training to ensure that staff have the knowledge and skills required for their positions.
5. Consider reassigning the sprinkler technician to the grounds staff.

Custodial

As with other elements of the maintenance and operations department, there has been inconsistent leadership and supervision over the custodial staff in recent years due to turnover in the director position. As a result, many custodial employees are not certain from whom they are to take daily direction and often develop their own work routines.

Because the custodians work at different locations and have a variety of schedules it is impossible for a director to adequately supervise all custodians at all times. As a result the school principals provide some supervision and oversight of these staff.

The custodial staff are assigned to specific school sites, including five custodians who work at multiple sites. Similar to the grounds staff, the daily work schedules for each custodian were developed mainly by the custodians themselves, with minor input from the principals and the interim director of maintenance and operations.

FCMAT found no documented work schedules for individual custodians during fieldwork, however some schedules were provided later. The schedules provided were somewhat ambiguous, and the task descriptions were not always consistent with information gathered from staff interviews. Thus it was unclear whether the site custodians were following their written schedules.

Because the work schedules for custodial positions are inconsistent and incomplete, an in-depth evaluation of the time required to perform essential custodial tasks for each site will need to be performed and daily or weekly work schedules developed for each custodial position. The evaluation should analyze the weekly, monthly and annual cleaning needs of each site, and schedules should be developed for each site to meet those needs. Individual tasks and the time needed to complete them will need to be identified, organized and assigned to staff. Each work schedule should then be given to the employee in writing, documented by the department as received by the employee, and used when evaluating the employee's performance. The district will need to identify supervisory roles for some custodial positions, particularly the night custodians, for whom there is not currently a supervisor. These supervisors cannot be part of the same bargaining unit as the individuals they supervise. Individual cleaning schedules should be equitable based on productivity standards rather than on individual employee capabilities.

The district provided FCMAT with documentation of cleaning standards in a booklet titled *Custodian Handbook*. The handbook contains cleaning standards, but many of the pages are under the heading of the Riverside Unified School District, and no documentation was provided to identify adoption of this book by the Beaumont Unified School District. One of the custodians interviewed by FCMAT indicated they had no knowledge of a written daily schedule or a custodial handbook. If the district is using this handbook, it needs to be revised, updated, and adopted by the school board. Once it is adopted, the district can provide training for all its custodians and substitute custodians to review and train staff members on the information contained in the handbook and on district expectations and standards.

Along with development of work schedules, the district needs to develop and formally adopt cleaning standards and expectations for custodial work. The standards must identify expected daily, weekly and monthly duties. The standards need to be developed with the participation of executive management and be approved by the school board. It is best to develop these standards before developing work schedules so that the schedules can include adequate time to complete the tasks the standards require. The standards can also be reflected in the expectations and qualifications expressed on the job descriptions.

In order to develop meaningful standards, planners, administrators and community members need to agree on what constitutes cleanliness. Although there is no nationwide standard for describing standards of cleanliness, the U.S. Department of Education has established five levels of cleaning and how many square feet of a building a custodian working an eight-hour shift can reasonably be expected to complete to each level:

- Level 1 cleaning results in a “spotless” and germ free facility, as might normally be found in a hospital environment or corporate suite. At this level, a custodian with proper supplies and tools can clean approximately 10,000 to 11,000 square feet to this level in eight hours.
- Level 2 cleaning is the uppermost standard for most school cleaning and is generally reserved for restrooms, special education areas, kindergarten areas, or food service areas. This service level for classrooms includes vacuuming or mopping floors daily, and sanitizing all surfaces. A custodian can clean approximately 18,000 to 20,000 square feet to this level in an eight-hour shift.
- Level 3 cleaning is the norm for most school facilities. It is acceptable to most interested parties and does not pose any health issues. Classrooms are cleaned daily, which includes dumping trash and cleaning common area surfaces such as sinks and door handles. Carpets are vacuumed and surfaces students use are sanitized every other day on a schedule that alternates days for these two tasks. A custodian can clean approximately 28,000 to 31,000 square feet to this level in eight hours.
- Level 4 cleaning is not normally acceptable in a school environment. Classrooms would be cleaned every other day, carpets would be vacuumed every third day, and dusting would occur once a month. A custodian can clean 45,000 to 50,000 square feet to this level in eight hours.
- Level 5 cleaning can very rapidly lead to an unhealthy situation. Trash cans might be emptied and carpets vacuumed only weekly. One custodian can clean 85,000 to 90,000 square feet to this level in eight hours.

The figures above are estimates. The actual number of square feet per shift a custodian can clean will depend on additional variables, including the type of facilities, flooring, wall covers, number of windows, restroom layouts, gym and athletic facilities, and offices, all of which must be taken into account when determining workload expectations.

Recommendations

The district should:

1. Develop and adopt acceptable standards of cleaning.
2. Review, revise and update custodial job descriptions to include the district’s current needs and expectations.
3. Develop and implement custodial work schedules, taking into account available staffing and the district’s cleaning standards.
4. Provide ongoing training to ensure that staff are knowledgeable and skilled in the tasks and duties their positions require.

Custodial Supervision

The district has a job description for a supervisor of custodians position, but this position is vacant. Because the majority of custodians work at night and are largely unsupervised, filling this position would help establish consistent supervision for the night custodians, especially if their performance has not been satisfactory. Another organizational structure that could be considered would be to assign lead duties to one custodian at each site to make decisions, and to assign supervision of the day custodians to the site principals.

Recommendation

The district should:

1. As funding allows, fill the custodial supervisor position to provide oversight of custodians, in particular those who work at night.

Facilities Department

Staffing and Organizational Structure

The facilities department is staffed by a part-time substitute director of facilities planning, and a facilities accounting technician who splits her time between facilities duties and other business office accounting duties. The substitute director works 70 hours per month and has oversight responsibility for the following projects:

- Parking lot resurface
- Reviewing non-Division of the State Architect (DSA)-approved portable buildings
- Reviewing multipurpose rooms
- Close out with DSA for the recent new construction of the district office and maintenance and operations facility

There are four modernization projects under review by the DSA.

The accounting technician divides her time between several facility and general business functions. This position supports several functions that would usually be under the direction of the assistant superintendent of business, such as the following:

- Facility use by outside organizations
- Developer fee assessment and collections
- Personal vehicle use
- Personal appliance use
- Emergency preparedness committee

FCMAT has been informed but has not confirmed that the district has used the available bond capacity from Measure Z and will have to wait until real property assessed valuations increase before completing additional bond sales. FCMAT has also been informed that there is \$18 to \$20 million in remaining funds for facility modernization, property purchases or new construction. The ongoing need for both facilities positions will depend on the governing board's direction for these funds. Many of the facility duties will be reduced if there are no projects under way.

Having a part-time facilities director is an appropriate use of district resources. It would benefit the district to continue this practice and periodically evaluate its needs. The part-time facilities positions should suffice until the district either completes all current projects or develops additional projects that require additional assistance.

The district will need to evaluate the age of its facilities and keep current with its enrollment growth projections to determine the eligibility of its facilities for modernization and new school construction with the Office of Public School Construction (OPSC). The district should also be aware that there are no funds available for the state's share of school facility expenditures; there is a backlog of applications for these projects, and many millions of dollars are already committed but unfunded for existing school projects.

The district will need to determine appropriate supervision for the facilities accounting technician position. More than 50% of this position's duties do not directly fall under the responsibility of the director of facility planning.

Recommendations

The district should:

1. Maintain its part-time facilities director and facilities accounting technician to manage its current facility projects, assist in planning for future facilities needs, and help identify and apply for eligibility and consideration for additional state funds as available.
2. Periodically evaluate the district's needs and adapt staffing to fit those needs.

Facilities Job Descriptions

Director of Facilities Planning

Because this position is currently part time, some of its duties are better assigned to the business department. Several of the position's responsibilities are not clearly defined. The current lull in construction activity affords the district the opportunity to review and revise specific duties it believes are required for this position. Duties in the job description that need revision or further definition include the following:

- Creates designs, manages and oversees programs, services and projects for the purpose of ensuring continuous improvement to services and compliance with Federal, State, District and local guidelines
- Communicates, guides and directs internally and externally for the purpose of providing information dissemination on policies, procedures, rules and regulations, information gathering, issue identification and resolution, training and development

The following duties of the position would be best placed under the authority of the business department:

- Manages and oversees budget and financial aspects of department (e.g. long term debt program, District investments, collection of developer fees, certificates of participation, tax override receipts and state school building program appropriations, etc.) for the purpose of ensuring financial records are maintained, adequate funds are available to meet the needs of the District; and, funds are collected and utilized in accordance with Federal, State, local and District policies, procedures and guidelines
- Provides annual and long-range growth projections recommending boundary adjustments, year-round implementation, and interim housing facilities.

The job description lacks important components including the following responsibilities:

- Reviewing all architectural drawings with the director of maintenance and operations to determine maintenance capabilities and coordinate facility standards for equipment and supplies.
- Directing architects and contractors on the design, construction or alteration of school buildings and landscaped areas, reviewing and assisting in making changes to plans and specifications.
- Preparing specifications for materials to be used in all construction projects adhering to district standards, such as air conditioning units, locks, sinks and faucets, door types

and other items, and inspecting work and materials for compliance with established standards.

- Making determinations regarding change orders and other modifications to construction documents to reflect field conditions or other unanticipated problems.
- Ensuring that the district receives appropriate credits for cost-reducing changes.
- Reviewing all construction activities to ensure compliance with all plans and specifications in architectural drawings.

Recommendation

The district should:

1. Consider revising the job description for the director of facilities planning position to add responsibilities related to facility construction management.

Facilities Accounting Technician

FCMAT interviewed the employee in this position, who provided a detailed list of the duties and functions of her current assignment. This employee spends more than 50% of their time performing tasks for the business department that are not in the facilities accounting technician job description. If the district becomes involved in multiple major construction projects at one time, FCMAT believes that sufficient work would exist to justify a full-time facilities accounting technician. The current job description is sufficient for that purpose.

Recommendations

The district should:

1. Regularly evaluate the facilities work and the need for the facilities accounting technician position as facility projects are completed or additional projects are added.
2. Consider moving some of the non-facility construction duties to identify them as business office staff duties, or at minimum cross-training staff regarding those duties to facilitate options should changes become necessary.

Facilities Master Plan

Once a school board has decided to create or update its district's facilities master plan, it must do three things: set goals and expectations for the plan; allocate resources and set direction for district staff; and assemble an advisory committee. A governing board must prioritize its objectives for the plan and provide oversight to the staff. Flexibility, adequate funds and appropriate timelines will all depend on direction from the board to district staff (California School Boards Association, Nov. 2007).

A facilities master plan should also be integrated with a district's educational and technology master plans and should ensure that the final plans will be formulated to meet the long-term needs of students, teachers, administrators, parents and the community.

FCMAT reviewed the district's facilities master plan last revised in 2013. The plan reviews each school site and provides suggestions to bring the sites up to current building codes, provide energy efficiency, replace portable classrooms with permanent buildings, and redesign campus access for parking and security. Many items designated for replacement or repair should be considered preventive maintenance or deferred maintenance. These include replacement of light lenses, air conditioning unit maintenance, replacing stained ceiling tiles, or cleaning roof drains.

The report indicates several items to be corrected that do not conform to current building codes. However, there is no requirement to remodel existing facilities to 2010 building standards; the facilities were built to the standards in place at the time of construction. Current building standards will be enforced if and when new architectural plans for modernization are submitted to DSA.

If the district can qualify for state funding, several of the modernization projects for replacing portable classrooms with permanent structures may be warranted. Currently, several school sites are underused and the district will not qualify for eligibility for funding in the foreseeable future. Using local funds, the district has the opportunity to balance its future needs and modernize facilities without state funding. The decision of which facilities to improve using local funds lies with the district; the governing board will have to determine the best use of current Measure Z funds and should review closely the future enrollment growth to determine future facility needs and the ability to fund those projects.

The facilities master plan includes a portion of the demographic study the district commissioned. Given the classroom capacity at each school site and the actual and anticipated growth for the next several years, the plan projects that the district's existing facilities have sufficient capacity through 2016. According to the report, the district will not need to build a new school until a significant number of new homes are built within district boundaries. The district's enrollment growth is slightly ahead of the report's projection, so it is important to annually assess the actual student growth rate and growth direction to determine future new school construction needs.

The state provides matching funds for modernization every 25 years for any particular school site. According to the data in the facilities master plan, the district does not have any school sites that would qualify for modernization funding. Therefore any projects that its facilities master plan identifies for existing school sites would depend completely on local funds.

Recommendations

The district should:

1. Regularly review its facilities needs, and update facilities plans accordingly.
2. Regularly evaluate the availability of state funding and its eligibility for such funding, in conjunction with its facilities needs.

Staffing Comparisons

Comparison Districts

To develop staffing comparisons, FCMAT attempted to obtain data from five California unified school districts selected by Beaumont Unified School District. FCMAT requested information from Redlands, Hemet, San Jacinto, Yucaipa-Calimesa, and Banning unified school districts. Not all districts responded to FCMAT's survey; however, FCMAT added information from Claremont Unified School District, which has similar average daily attendance (ADA) to Beaumont.

To standardize information, enrollment totals used are based on certified enrollment counts submitted through the California Longitudinal Pupil Achievement Data System (CALPADS) for the 2011-12 school year, which was accessed through Ed-Data (www.ed-data.k12.ca.us). Because comparison districts are K-12 districts, it is assumed that they all have similar sporting, educational, and career development facilities that their maintenance and operations departments must maintain.

FCMAT reviewed information from each of the selected school districts on the Ed-Data web site to confirm the total number of school sites each has reported. FCMAT also contacted each school district to request data for comparison purposes. This information is for general comparison and may not reflect all unique characteristics of each district, including local priorities, facility configurations, facility ages and other influences. Staffing and facility data were provided by each school district and were not verified further.

A general comparison of custodial, maintenance and grounds staff is provided in the following three tables. There are three generally accepted methods for comparing staffing between school districts: total enrollment; total square footage of buildings or acres for grounds; and the number of school sites. For some school districts, providing accurate square footage of all facilities and acres of landscaped ground may be too burdensome, and FCMAT did not receive sufficient comparable data. Therefore, FCMAT chose to use total enrollment and total number of school sites for comparison purposes.

Additional facilities such as district offices, central kitchens, and maintenance, operations and transportation facilities are not counted as separate sites in this comparison because they differ greatly from district to district. FCMAT compared only actual school sites as reported by the districts. All additional district sites are assumed to be proportional to the school sites. In addition, school districts may have adult, charter, and alternative education programs housed on existing campuses. These programs are included in the site numbers, even if they have their own physical address, and students enrolled in these programs are included in the total enrollment figures.

Maintenance Staffing

	Redlands USD	Hemet USD	San Jacinto USD	Claremont USD	Beaumont USD	Average*
Number of school sites	25	22	12	9	10	17
Total staff	19	18	9	7	10	13.25
Enrollment	20,964	21,977	9,851	6,936	8,789	14,932
Enrollment to staff	1103	1221	1095	991	879	1,102.5
Staff to No. of sites	0.76	0.82	0.75	0.78	1	0.78

*Average excludes Beaumont USD.

Beaumont has the highest ratio of maintenance staff to school sites and the lowest ratio of students to maintenance staff of the school districts surveyed. Both of these indicate that Beaumont has higher staffing in their maintenance department than the comparison districts. The staffing per site in the comparison districts is 0.78 FTE; Beaumont staffing per site is 1.0 FTE. If Beaumont's maintenance staffing were the same as the average of the comparison districts, it would have 7.8 FTE maintenance staff. The average enrollment-to-staff ratio for the comparison districts is 1,102-to-1; Beaumont's ratio is 879-to-1. If Beaumont's maintenance staffing was the same as the average of the comparison districts, it would have 7.9 FTE maintenance staff. Both methods of comparison show similar results regarding staffing and indicate that to match the average Beaumont would need to reduce its maintenance staffing by approximately 2 FTE.

Custodial Staffing

	Redlands USD	Hemet USD	San Jacinto USD	Claremont USD	Beaumont USD	Average*
Number of school sites	25	22	12	9	10	17
Total staff	76.5	50	24.5	33	31	46
Enrollment	20,964	21,977	9,851	6,936	8,789	14,932
Enrollment to staff	274	440	402	210	284	325
Staff to No. of sites	3.06	2.27	2.04	3.67	3.1	2.71

*Average excludes Beaumont USD.

Beaumont USD has the second highest ratio of custodial staffing per site among the comparison districts. Beaumont's staffing per site is only approximately 0.4 FTE higher than the average, there is a large difference between the lowest (San Jacinto USD) and highest (Claremont USD) ratios in this comparison. If Beaumont were to staff at the same ratio as San Jacinto USD, it would need to reduce staffing by 10.0 FTE custodians; if it were to staff at the same ratio as Claremont USD, it would need to increase staffing by 5.0 FTE custodians.

Using enrollment-to-staff ratios, Beaumont is in the middle of the comparison group, with two districts reporting a higher staffing ratio and two reporting a lower. Beaumont's custodial staffing is approximately 14% higher than the average. If Beaumont changed its staffing ratio to match the average of one staff member to 325 students, it would need 27 FTE custodians, which is 4 FTE less than its current staffing.

Given this comparison data, FCMAT believes that Beaumont's custodial staffing is sufficient and that variances in staffing are due to differences in acceptable cleanliness levels and cleaning frequency.

Grounds Staffing

	Redlands USD	Hemet USD	San Jacinto USD	Claremont USD	Beaumont USD	Average*
Number of school sites	25	22	12	9	10	17
Total staff	21	15	6	6	10	12
Enrollment	20,964	21,977	9,851	6,936	8,789	14,932
Enrollment to staff	998	1,465	1,642	1,156	879	1244
Staff to No. of sites	0.84	0.68	0.5	0.67	1	0.71

*Average excludes Beaumont USD.

Based on both staffing per site and enrollment per staff member ratios, Beaumont has a higher ratio of grounds staffing than all districts surveyed. Compared to the average staffing of 0.71 FTE ground staff per school site, Beaumont, with a ratio of 1.0 FTE, is overstaffed by a total of almost 3 FTE; compared to the district with the next closest staffing ratio (Redlands, with 0.84), Beaumont is overstaffed by a total of 1.6 FTE; and compared to the district with the lowest staffing ratio (San Jacinto USD with 0.5), Beaumont may have twice the staff it needs.

If it used the average enrollment per staff member ratio of the comparison districts, Beaumont would have approximately 7 FTE grounds staff. If Beaumont staffed at the ratio of Redlands, the district with the closest staffing ratio to its own, its staffing would be reduced by approximately 1.0 FTE. As with the staffing per site comparison, the enrollment per staff member comparison indicates that Beaumont has approximately twice the staffing of San Jacinto USD, the district with the lowest staffing ratios.

The above averages only reflect the information provided by the school districts surveyed. This small sample of districts should not be the sole source for decision making, but should be an additional tool to use in evaluating the staffing needs of the maintenance and operations department. Each school district has unique characteristics that must be taken into account when determining staffing levels. District standards and expectations will likely differ as well. When reviewing staffing levels, it is best practice to first set expectations and standards, then apply schedules and routines to meet those standards, and finally staff to fulfill those schedules and routines.

Published Ratios

Grounds

As with other school district functions, staffing for groundskeeping varies among California school districts. The following are most common factors that affect groundskeeping staffing levels at school sites and thus need to be considered:

- The total acreage of the school site
- The number and types of landscaped/outdoor spaces to be maintained
- The type and extent of natural and hardscape areas
- The extent to which groundskeepers are performing unrelated tasks

FCMAT has not developed a specific staffing formula for determining grounds maintenance, but has previously used the research and the staffing formula established by the Florida Department of Education, and published in that agency's *Maintenance and Operations Administrative Guidelines for School Districts and Community Colleges*.

The formula is based on two types of grounds personnel: those who perform general grounds functions such as mowing, gardening, and trimming; and those who care for athletic fields or other special open space areas. The formula for determining the number of FTE groundskeepers for special areas and athletic fields is the total acreage of the school facility divided by 40, plus 1 FTE groundskeeper, and an additional 1 FTE groundskeeper for every 500,000 square feet of athletic fields.

According to information provided by the district, it has a total of 191.35 acres of sites and a total of approximately 3,724,380 square feet of athletic fields for play and physical education. Applying the above staffing formula to the district's figures would indicate a need for 13.22 FTE groundskeepers. Because the district has 11 FTE groundskeepers, it is approximately 20% below the staffing requirement that this formula indicates. The 11 FTE includes one staff member who repairs equipment but does not perform grounds maintenance; in addition, one maintenance staff member performs sprinkler repair but is not included in the 11 FTE groundskeeper figure.

Grounds Staffing Needs Based on Florida Department of Education Formula

Type	District Totals	Divisor	Grounds Staffing + FTE
Total Acreage of Athletic Fields	191.35	40 (plus 1 FTE)	5.78
Total Square Footage of Athletic Fields	3,724,380	500,000	7.44
Total Staffing Requirements			13.22
	Current FTE		11

Custodial

The California Association of School Business Officials' (CASBO's) custodial staffing formula takes into account the square footage of sites and the number of students, staff, classrooms, offices and general purpose areas. The formula specifies the following staffing:

- One custodian for every 13 teachers
- One custodian for every 325 students
- One custodian for every 13 classrooms
- One custodian for every 18,000 square feet

The result is divided by four to indicate the number of custodians needed to clean and maintain a site.

This formula is based on industry standards and has been widely used for analyzing custodial staffing levels in schools throughout California. The CASBO recommendation for staffing is based on level 2 cleaning as identified in the U.S. Department of Education benchmarks for cleaning standards. Based on the district's information, the charts below show the district's staffing compared to that indicated by the CASBO standard. Depending on individual site characteristics such as underused classrooms or extra facilities located on a campus, the total

square footage ratio can skew the analysis. FCMAT corrected the ratio analysis for any unusual situations.

The following charts apply the CASBO custodial staffing formula to each of the district's school sites and compare the resulting recommended staffing data with the actual custodial time the district has assigned to that school site.

Brookside Elementary

	Total	Ratio	Recommended FTE
Teachers	23	1:13	1.77
Students	615	1:325	1.89
Classrooms	33	1:13	2.53
Square Footage	65,430	1:18,000	3.63
Total			9.82
Total Divided by 4	CASBO estimate		2.45
	Actual BUSD Staffing FTE		2.37

Palm Elementary

	Total	Ratio	Recommended FTE
Teachers	28	1:13	2.15
Students	622	1:325	1.91
Classrooms	34	1:13	2.61
Square Footage	47,133	1:18,000	2.61
Total			9.28
Total Divided by 4	CASBO estimate		2.32
	Actual BUSD Staffing FTE		2.50

Anna Hause Elementary

	Total	Ratio	Recommended FTE
Teachers	28	1:13	2.15
Students	784	1:325	2.41
Classrooms	33	1:13	2.53
Square Footage	67,850	1:18,000	3.76
Total			10.85
Total Divided by 4	CASBO estimate		2.71
	Actual BUSD Staffing FTE		2.50

Sundance Elementary

	Total	Ratio	Recommended FTE
Teachers	30	1:13	2.3
Students	754	1:325	2.32
Classrooms	33	1:13	2.53
Square Footage	65,429	1:18,000	3.63
Total			10.78
Total Divided by 4	CASBO estimate		2.69
	Actual BUSD Staffing FTE		2.50

Tournament Hills Elementary

	Total	Ratio	Recommended FTE
Teachers	31	1:13	2.38
Students	756	1:325	2.32
Classrooms	33	1:13	2.53
Square Footage	67,850	1:18,000	3.76
Total			10.99
Total Divided by 4	CASBO estimate		2.74
	Actual BUSD Staffing FTE		2.37

Three Rings Ranch

	Total	Ratio	Recommended FTE
Teachers	27	1:13	2.07
Students	661	1:325	2.03
Classrooms	40	1:13	3.07
Square Footage	67,467	1:18,000	3.74
Total			10.91
Total Divided by 4	CASBO estimate		2.72
	Actual BUSD Staffing FTE		2.50

Mountain View Middle

	Total	Ratio	Recommended FTE
Teachers	35	1:13	2.69
Students	1,038	1:325	3.19
Classrooms	42	1:13	3.23
Square Footage	86,456	1:18,000	4.8
Total			13.91
Total Divided by 4	CASBO estimate		3.47
	Actual BUSD Staffing FTE		3.50

San Geronio Middle

	Total	Ratio	Recommended FTE
Teachers	38	1:13	2.92
Students	1,038	1:325	3.19
Classrooms	47	1:13	3.61
Square Footage	105,560	1:18,000	5.86
Total			15.58
Total Divided by 4	CASBO estimate		3.89
	Actual BUSD Staffing FTE		3.37

Beaumont High School

	Total	Ratio	Recommended FTE
Teachers	83	1:13	6.38
Students	2,416	1:325	7.43
Classrooms	94	1:13	7.23
Square Footage*	214,988	1:18,000	11.94
Total			32.98
Total Divided by 4	CASBO estimate		8.24
*includes athletic facilities			
	Actual BUSD Staffing FTE		7.00
Total w/o Square Footage Ratio			21.04
Total Divided by 3	CASBO estimate		7.01

The calculation for Beaumont High School includes some square footage attributed to athletic facilities, and consequently its projected staffing needs may be overstated. The district's staffing for Beaumont High School is adequate when the total square footage element is not included in the CASBO formula and the total of the remaining ratios is divided by three.

Glen View High School

	Total	Ratio	Recommended FTE
Teachers	9	1:13	0.53
Students	105	1:325	0.32
Classrooms	8	1:13	0.61
Square Footage	12,196	1:18,000	0.67
Total			2.13
Total Divided by 4	CASBO estimate		0.53
	Actual BUSD Staffing FTE		.50

Adult Ed/ESF

	Total	Ratio	Recommended FTE
Teachers	12	1:13	0.92
Students	106	1:325	0.32
Classrooms	12	1:13	0.92
Square Footage	65,575	1:18,000	3.64
Total			5.8
Total Divided by 4	CASBO estimate		1.45
	Actual BUSD Staffing FTE		1.50

Districtwide Totals

	Total	Ratio	Recommended FTE
Teachers	344	1:13	26.46
Students	8,801	1:325	27.08
Classrooms	409	1:13	31.46
Square Footage	865,934	1:18,000	48.1
Total			133.1
Total Divided by 4	CASBO estimate		33.27
	Actual BUSD Staffing FTE		29
Adjusting for square footage and dividing by 3, yields the following:	CASBO estimate		28.33
	Actual BUSD Staffing FTE		29

If one eliminates the square footage ratio from the CASBO formula and uses only the other three factors, the district is adequately staffed at all school sites. Most of the individual site ratios are affected by the square footage formula and the number of classrooms, which in many cases appear to be unused based on the number of teachers and students to total site capacity. This is supported by the facilities master plan, which indicates that the district has unused classroom space.

It would benefit the district to add custodial staff to the educational support facility and district office complex, including the offices and restrooms in the maintenance and operations building. This complex has only 0.5 FTE of custodial service, which appears to be insufficient. Because of this building's unique characteristics including the large amount of glass to be kept clean, the general difficulty of moving custodial equipment throughout the building complex, setups for board meeting and special occasions (duties being handled by the night maintenance personnel), there is a need for additional custodial support.

The architectural rendering of this facility indicates that its square footage is 49,975. It is unclear whether this amount accurately represents current office space, and whether it includes the workshop area, nutritional services cold and dry storage areas, and the square footage associated with a portion of the building that was deleted prior to construction. It would benefit the district to determine the current square footage of office space used for the educational support buildings and calculate custodial service needs using the square footage ratio adjusting for the unique characteristics, board meeting room usage, and additional needs for general setups and take downs for meetings and conferences.

Using the CASBO ratio analysis and the current capacity for and actual student and staffing loads at all school sites, FCMAT concludes that the district has sufficient custodial staffing at school sites to provide a level 2 standard of cleaning at all sites except the district office complex.

Recommendations

The district should:

1. Establish districtwide standards and expectations for facilities maintenance, grounds, and custodial functions.
2. Implement routines and schedules to meet district-adopted standards and expectations, and establish staff accountability measures accordingly.
3. Staff facilities maintenance, grounds and custodial functions in accordance with routines and schedules and as funding allows.
4. Routinely evaluate its needs and desires for facilities maintenance, grounds and custodial services and revise schedules and staffing accordingly.

Preventive Maintenance

The district lacks any type of formal or written plan for scheduled preventive or deferred maintenance. An effective formal preventive maintenance plan will include a database of district buildings and equipment that may require ongoing preventive maintenance and repair, and typically includes purchase prices, anticipated life expectancies, replacement schedules and budget information needed to implement the program. Without a scheduled preventive maintenance program, the maintenance and operations department has found itself responding to emergencies with no time for scheduled preventive maintenance.

The district needs to implement a comprehensive scheduled preventive maintenance program to keep facilities and equipment in acceptable operating condition. A scheduled preventive maintenance program includes regular inspection and maintenance before facilities deteriorate or equipment breaks down. This is different from a remedial maintenance program, which restores and/or repairs facilities and equipment only after a malfunction or breakdown. Scheduled preventive maintenance should be viewed not simply as a cost, but as an investment.

Expected and desired outcomes of a preventive maintenance program include the following:

- Increased life of school buildings and district equipment
- Improved operating efficiency of equipment
- Reduced breakdowns
- Lower operating costs
- Improved safety
- Improved customer satisfaction; less school disruption and downtime due to remedial maintenance activities

The following actions and steps are needed to create an effective preventive maintenance program:

- Create department policy regarding preventive maintenance, and include funding sources.
- Develop an organizational chart that indicates the scheduled preventive maintenance program responsibilities.
- Establish a computer database, by site, that identifies all equipment and buildings, including the name, location, description, age, part number, date of purchase, identification number, and other relevant information for each.
- Create a computer database that includes the dates when the servicing or replacement of equipment should occur and that can display this information in chronological order.
- Establish a financial plan and funding sources for school preventive maintenance, as well as budget codes needed to track these expenditures.
- Establish a program to update the district's facilities and equipment inventory each year and show the changes that have occurred during the current year as a result of maintenance performed, the addition of new equipment or facilities, the demolition of facilities, the sale of equipment, and any other changes to the status of facilities or equipment.

- Using the data from the above items, establish a long-range (five-year) maintenance and financial plan for the scheduled preventive maintenance program.

Recommendations

The district should:

1. Develop, adopt and implement a preventive maintenance program.
2. Annually review and revise the preventive maintenance program to align with changing district needs.

Electronic Work Order System

The district uses the Scheduling Project Management System (SPMS) electronic work order program. This program enables authorized staff at sites to generate work requests and monitor the status of work orders. The work order system has the ability to schedule, track costs for budget purposes, communicate the status of projects and repairs to administrators and secretaries, and schedule preventive maintenance, and can be used as a tool for accountability. The district is not using the work order program to its fullest potential. The district has not properly trained staff in its use or held staff accountable for using it. As a result, administrators have become frustrated with the lack of communication between maintenance personnel and school site staff.

Currently, the school clerks enter work requests into the work order system at the direction of their site principal. Each maintenance worker accesses the work order system at the beginning of their shift, prioritizing, printing their own work orders and determining the order in which they will be completed. At the end of each day, the workers are to log on to the work order system and close out each of their completed work orders.

FCMAT reviewed an active work order report that was to contain open work orders, meaning those that still needed to be completed. The report was 42 pages long. FCMAT was unable to determine which work orders had been completed and which were still pending. FCMAT also asked one of the district's principals to provide an open work order report for their school site. This report was five pages long, and the principal noted that almost all of the work requests were still not completed, and that one work order dated back to May 2012.

It is best practice to ensure that the director of maintenance and operations has the responsibility of establishing work priorities, assigning work orders to staff, and following up to ensure completion. Assignments need to come from the director to the maintenance staff via work orders. Once the assigned work orders have been completed, the employee needs to fill out the appropriate information on the work order and turn it in to the maintenance secretary at the end of the work shift. Using secretarial staff to generate, coordinate and close out work orders gives maintenance employees additional time to focus on maintenance and repairs.

The director will need to review the list of active work orders to determine which jobs have been completed and which still require action. It would be most efficient for the director to organize the list of open repair orders by site, create a prioritized list, and then assign them to staff. Creating a list of materials required in advance and assigning several maintenance personnel to some tasks to complete repairs can further increase efficiency.

The director will need to establish open communication with administrators and staff at the school sites through both personal communication and the work order system. This can help eliminate the frustration of differing expectations regarding the status of requested projects.

It is a best practice for a director to walk every school site at least once per month, to check in with the principal and site staff, to evaluate the work of the maintenance, grounds and custodial staff, and to look for items that need attention.

Recommendations

The district should:

1. Train staff and hold them accountable to use the work order system.

2. Fully implement the work order system so that it becomes a reliable tool for communicating facility needs, tracking costs, and ensuring staff accountability.
3. Have the director assign and follow up on work orders, and give the department secretary the responsibility of entering completed work orders into the system and regularly creating reports of open work orders for the director to review.
4. Have the director establish regular communication with the school sites through the work order system, district meetings, and site walks. The intent of this two-way communication is for the sites and the maintenance and operations department to share concerns and work together to resolve issues and ensure more effective and efficient service.

Five-Year Deferred Maintenance Plan

The district does not have a current or recently revised five-year deferred maintenance plan. Typically this report includes major repairs to items such as roofing, plumbing, heating, air conditioning, electrical systems, wall systems, and floor systems. The intent of this type of plan is to forecast deferred maintenance projects over the next five years. It is not intended as an expenditure report, so the reported project costs should be estimates. In addition, there is no requirement for the district to perform all the work listed in such a plan.

Once the district hires a new director of maintenance and operation, this individual will need to arrange assessments of roof systems, paving needs, painting, asbestos removal if required, window and door replacement needs, HVAC replacement requirements and other items, then prioritize projects and build a five-year plan to correct deficiencies.

The district should consider funding its deferred maintenance plan as finances allow and continue to transfer a portion of the general fund into Fund 14, deferred maintenance. This will maintain funds to provide the large scale maintenance and repairs that all school districts need over time.

Recommendations

The district should:

1. Assess the condition of its facilities and forecast maintenance needs over the next five years.
2. Prioritize and plan maintenance projects in response to anticipated needs. Include in its five-year deferred maintenance plan expected costs, funding sources, and completion methods.
3. Routinely set aside sufficient funds in Fund 14 to support deferred maintenance.

Communication, Purchasing and Inventory, Morale, Vehicles, and Facility Conditions

Communication

FCMAT found little evidence of regular communication within the maintenance and operations department or between the department and the district's leadership.

There is no significant or useful direct communication between the interim director and the maintenance and operations staff. Employees do not carry radios, telephones, or other district-issued communication devices. Employees complete jobs, duties and assignments at their own discretion. Individuals interviewed indicated that maintenance and operations staff have little to no accountability for their time or completion of their assigned duties. The school site principals also have limited supervisory access and authority over custodians assigned to their school sites. There does not appear to be a chain of command for any operations the maintenance and operations department performs.

Communication between the director and employees is critical. The district needs to establish a system that allows the director to communicate with and monitor the location of all employees throughout the work day. Several cellular telephone companies provide basic telephones that provide a push-to-talk feature while turning the cell phone function off, with the exception of a 911 call, and provide GPS location monitoring. These units are inexpensive and may qualify for E-Rate reimbursement to help defray the cost.

The assistant superintendent of business services and the director of maintenance do not meet regularly. Although both of these positions are part of the superintendent's cabinet and participate in those meetings, both individuals indicated that they do not meet with one another regularly. The assistant superintendent and the director need to meet to review progress, discuss concerns, and set goals for the department. Other upper-level management and the board of trustees also need to participate in setting goals and provide support in the efforts to meet the district's maintenance and operations needs. This executive support for the department will reinforce the authority of the director in setting and enforcing the department standards.

Recommendations

The district should:

1. Purchase and use communication devices that allow the director and site administrators to contact maintenance and operations staff members as needed and monitor their location.
2. Begin holding regular meetings of the director of maintenance and district leadership to review department progress, discuss concerns and set department goals.
3. Establish and communicate a chain of command for the maintenance and operations department.

Purchasing and Inventory

FCMAT observed inefficiencies and a lack of control with regard to inventory. Items needed regularly are not kept on hand, yet other items are kept in excess. In addition, items of high value are not secured. Staff regularly travel off the work site to obtain materials and supplies needed.

The district purchases custodial supplies as needed from a reputable vendor. The maintenance and operations clerk creates custodial supply orders based on requests from school site custodians, and the items are purchased and delivered directly to the site. FCMAT could not find any evidence of purchasing oversight or inventory control over products purchased.

Maintenance workers have an inefficient procedure for purchasing parts and materials for their work projects. An inventory of frequently used parts and supplies is not kept in stock and readily accessible. In addition, no planning is done to identify supplies needed for multiple projects. The procedure is for workers to go the site to determine the problem and identify parts needed, get approval, drive to the store to purchase materials or parts, then return to the site to complete the work. This is an ineffective use of the employee's time. Keeping frequently used parts and supplies on hand and planning for items needed for the day or preferably the week would reduce time spent traveling and increase time available to complete tasks.

FCMAT observed one heating, ventilation and air conditioning (HVAC) dual-pack roof mounted unit and two Bard heat pump units for portable classrooms sitting on the ground at Chavez Elementary School. The district has invested more than \$15,000 in these three HVAC units. Depending on need, this may be justified, but the units need to be kept more secure. Staff also stated that they had a Sea-Train shipping container almost full of plumbing parts and several other containers with various maintenance parts and supplies. FCMAT also observed several thousand dollars' worth of new grounds equipment stored in a container, including weed eaters, hedge trimmers, shovels and rakes.

The district will need to evaluate its purchasing practices for common maintenance, custodial and grounds supplies to determine if it is more cost effective to purchase items in bulk and keep them on hand or to purchase them as needed. The director of maintenance and operations will need to develop an inventory of most commonly used materials and parts that should be kept in the maintenance warehouse and/or on the maintenance vehicles to expedite some of the more common repairs. The director will also need to closely monitor the purchases made and ensure that safeguards are in place for inventory control. Each purchase should be linked to a job or project and shown on the work order, which should then be reviewed by the department clerk and the director.

The district will also need to compile a complete inventory of all equipment (both motorized and electrical), tools, and vehicles including tractors, mowers and landscaping mechanized units. This inventory should also include all custodial equipment such as floor scrubbers, polishers and disposable items such as brooms, mops and buckets. Once the inventory is in place, a plan for service and replacement of items and for monitoring of consumables can be developed.

It would also benefit the district to move all supplies and equipment that remain at outlying facilities to its new maintenance and operations facility. The director of maintenance and operations can develop a plan for this.

Recommendations

The district should:

1. Implement inventory, usage tracking, and purchasing management controls for maintenance and operations parts, supplies and equipment.
2. Identify parts and supplies needed frequently and stock them in regular inventory.
3. Compile an inventory of vehicles, equipment, tools and consumables to help safeguard district assets, establish a maintenance and replacement schedule, and monitor usage.
4. Move all supplies and materials to the maintenance and operations facility so they can be easily secured and accessible.

Employee Morale

Maintenance and operations staff interviewed reported that employee morale was low. The overwhelming response from staff was that they felt overworked and unappreciated. Most employees felt that they were consistently operating in the role of emergency response and that they lacked consistent schedules and direction. The maintenance and operations employees clearly and consistently pointed toward the lack of consistent leadership in the department as the cause. Several employees indicated that they felt there was a divisive relationship between maintenance and operations staff and the district office administration.

This situation reinforces the need, when a new director of maintenance and operations is hired, to establish open communication between the director and the staff, hold regular staff meetings, and resolve department issues as they arise. Implementing consistent schedules, equal responsibilities, and creating equitable workloads will help alleviate the feeling of being overwhelmed. Regular feedback, both positive and negative, from school sites and district administration should also be encouraged and shared with the staff. The director will need to work to resolve any differences in perception of work quality between those who deliver services and their customers.

Clear expectations and fair accountability with regard to the quality and quantity of work will also address the impression that some employees work harder than others.

Recommendations

The district should:

1. Make efforts to provide consistent leadership in the maintenance and operations department.
2. Implement work schedules and establish reasonable workloads for staff.
3. Set clear expectations and implement fair accountability with regard to quality and quantity of work.
4. Support the director in mediating differences between the maintenance and operations staff and their customers.

5. Establish open communication between the director and the staff, hold regular staff meetings, and resolve department issues as they arise.

Vehicle and Equipment Replacement

FCMAT's observations and a review of vehicle and equipment inventory indicate that the maintenance and operations department needs additional vehicles and equipment. The district does not have a replacement program, and as a result, the department is beginning to depend on aged, worn out vehicles and equipment. Some maintenance employees drive small pickup trucks that cannot carry the tools or supplies needed to efficiently and effectively respond to the district's maintenance needs.

A thorough assessment needs to be conducted of vehicles and equipment, and a replacement program devised. A formal replacement program should include criteria such as mileage, age, condition and other factors, that are evaluated regularly to help develop a forecast of replacement needs. Once a vehicle or item of equipment meets the established criteria, it would qualify for replacement. Implementing a replacement program will also require establishing and overseeing a replacement budget.

Recommendations

The district should:

1. Create a detailed vehicle and equipment inventory that includes each item's condition, age and usefulness.
2. Evaluate the inventory in relation to the district needs, and identify shortcomings.
3. Develop an ongoing plan and budget to acquire needed equipment and replace aged or less useful equipment.

Facilities

FCMAT observed most of the district's current facilities. In general, they are all in good condition. The FCMAT study team also walked through four school sites and observed classrooms, kitchens, offices, playgrounds and common areas. The district's facilities are in good repair, clean inside and out, and the grounds are well maintained.

FCMAT did find areas of concern at the new maintenance and operations facility, specifically the following:

1. The safety equipment that provides emergency eyes washing and a rinse shower inside the work area was inoperable at the time of FCMAT's fieldwork.
2. Table saws, a panel saw, cutoff saws, a band saw and other power tools were not installed and not tied into the dust collection system.

3. The particulate dust vacuum system equipment lacks a control box and is thus not functional.
4. Air compressors are not connected to a dedicated 220-volt electrical circuit to allow the use of air-operated equipment.
5. A wash rack with a grease and debris trap to steam-wash vehicles and equipment is not installed.
6. A staircase or lift is not available to access the mezzanine storage area.

Before final DSA closeout, items 1 through 3 above need to be reviewed and inspected by district staff, the architect, mechanical and electrical engineers, the general contractor, and the DSA inspector of record.

The new director of maintenance and operations will need to immediately communicate with the director of facilities to outline the needs that were overlooked during construction, specifically items 4 through 6 above. The director of facilities will need to bring these items to the attention of the architects and construction managers to ensure that they address the deficiencies. Completion of the new maintenance and operations facility is important to the success of a comprehensive maintenance and operations department.

Maintenance staff have taken areas intended for work benches and storage of tools and equipment and made themselves office-like workspaces. Individual maintenance personnel do not need an office to complete their job duties. The maintenance and operations clerk can enter completed work order information, and it is the role of the director to assign each work order as it is received. The maintenance and operations employees do need a break and lunch area, which could also be used for small group meetings regarding training and safety issues. The director can determine a suitable location for such a room.

Recommendations

The district should:

1. Fix outstanding safety and construction deficiencies at the maintenance and operations facility.
2. Implement a process for inspecting and reviewing construction and repair projects to ensure that they are completed to the district's and legal specifications.
3. Have the director of maintenance and operations print and assign work orders and the department clerk enter completed work orders into the system.
4. Establish a location for staff meetings and for staff to complete the minimal paper and computer work required as part of their duties.

Appendix

Study Agreement



CSIS California School Information Services

**FISCAL CRISIS & MANAGEMENT ASSISTANCE TEAM
STUDY AGREEMENT
March 27, 2013**

The Fiscal Crisis and Management Assistance Team (FCMAT), hereinafter referred to as the team, and the Beaumont Unified 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 assign professionals to study specific aspects of the Beaumont Unified School District's 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.

In keeping with the provisions of Assembly Bill 1200, the county superintendent will be notified of this agreement between the district and FCMAT and will receive a copy of the final report. The final report will also be published on the FCMAT website.

2. SCOPE OF THE WORK

A. Scope and Objectives of the Study

The scope and objectives of this study are to:

1. Conduct an organizational, staffing and efficiency review of the district's facilities, maintenance, grounds and custodial operations.
 - a. The team will provide comparative staffing data for districts of similar size and structure and make recommendations to improve operational efficiencies that may reduce district costs. The comparison will include at least three comparable school districts and may include those used in the district's collective bargaining process.

- b. The team will review job descriptions for all department positions; evaluate capacity, scheduling, efficiency and functions; and make recommendations for staffing and operational improvements. All recommendations will include estimated savings or costs for any proposed position reductions or additions. This component will include interviews with district and site employees regarding the level of service the department provides.
- c. The team will evaluate the operational work flow of each function for the facilities, maintenance, grounds and custodial department and make recommendations for improved efficiency and standard industry practices. This component will include the following:
 - i. Evaluate the district's comprehensive maintenance and deferred maintenance plans to support and provide preventive maintenance for all facilities, grounds, and the district's major facilities systems (HVAC, mechanical, plumbing, electrical, and structural).
 - ii. Review the district's maintenance work-order system for repairs of facilities and equipment to ensure that all maintenance and repairs are completed in a timely fashion, and that work-order status reports are provided regularly.
 - iii. Review the district's long-range facilities plan, and provide recommendations for staffing, if any.
 - iv. Evaluate the grounds and custodial service plans for each site to ensure that the tasks and expectations for custodial and grounds employees are clearly outlined and indicate a detailed daily and periodic schedule for cleaning and simple repairs of the facilities. This will include the evaluation of the summer and non-school day programs for specialized cleaning and repairs.

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 team's procedures and 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. Exit Report – 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 – Approximately 10 days after the exit meeting, the team will issue an exit letter briefly summarizing significant findings and recommendations to date and memorializing the topics discussed in the exit meeting.
5. Draft Reports – Electronic copies of a preliminary draft report will be delivered to the district’s administration for review and comment.
6. Final Report – Electronic copies of the final report will be delivered to the district’s administration and to the county superintendent following completion of the review. Printed copies are available from FCMAT upon request.
7. Follow-Up Support – If requested, FCMAT will return to the district at no cost six months after completion of the study to assess the district’s progress in implementing the recommendations included in the report. Progress in implementing 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, CFE, Deputy Executive Officer, Fiscal Crisis and Management Assistance Team, Kern County Superintendent of Schools Office. The study team may also include:

- | | | |
|----|------------------|--------------------------------------|
| A. | John Von Flue | FCMAT Fiscal Intervention Specialist |
| B. | Eric D. Smith | FCMAT Fiscal Intervention Specialist |
| C. | To be determined | FCMAT Consultant |
| D. | To be determined | FCMAT Consultant |

Other equally qualified staff or consultants will be substituted in the event one of the above 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 as follows:

- A. \$500. per day for each team member while on site, conducting fieldwork at other locations, preparing and presenting reports, or participating in meetings. The cost of independent consultants will be billed at the actual daily rate based on the provisions of Education Code section 84041.

- B. All out-of-pocket expenses, including travel, meals and lodging.
- C. 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 the district's acceptance of the final report.

Based on the elements noted in section 2 A, the total estimated cost of the study will be \$16,000.

- D. Any change to the scope will affect the estimate of total cost.

Payments for FCMAT's 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 during on-site reviews.
- B. The district will provide the following if requested:
 - 1. A map of the local area.
 - 2. Existing policies, regulations and prior reports that address the study scope.
 - 3. Current or proposed organizational charts.
 - 4. Current and two prior years' audit reports.
 - 5. Any documents requested on a supplemental list. Documents requested on the supplemental list should be provided to FCMAT only in electronic format; if only hard copies are available, they should be scanned by the district and sent to FCMAT in electronic format.
 - 6. Documents should be provided in advance of fieldwork; any delay in the receipt of the requested documents may affect the start date of the project. Upon approval of the signed study agreement, access will be provided to FCMAT's online SharePoint document repository, where the district will upload all requested documents.
- C. The district's administration will review a preliminary draft copy of the report resulting from 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 pupils. The district shall take appropriate steps to comply with EC 45125.1(c).

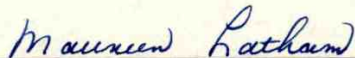
6. PROJECT SCHEDULE


The following schedule outlines the planned completion dates for different phases of the study:

Orientation:	April\May
Staff Interviews:	to be determined
Exit Meeting:	to be determined
Preliminary Report Submitted:	to be determined
Final Report Submitted:	to be determined
Board Presentation:	to be determined, if requested
Follow-Up Support:	if requested

7. CONTACT PERSON

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 4.10.13
 Dr. Maureen Latham, Superintendent
 Date
 Beaumont Unified School District

 March 27, 2013
 Anthony L. Bridges, CFE
 Date
 Deputy Executive Officer
 Fiscal Crisis and Management Assistance Team

