



El Dorado County Office of Education

Special Education Transportation Review

March 12, 2009

Joel D. Montero
Chief Executive Officer



March 12, 2009

Vicki Barber, Superintendent
El Dorado County Office of Education
767 Green Valley Rd.
Placerville, CA 95988

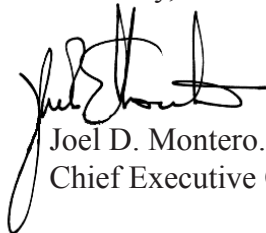
Dear Superintendent Barber:

In November 2008, the El Dorado County Office of Education entered into an agreement with the Fiscal Crisis and Management Assistance Team (FCMAT) for a study that would perform the following:

1. To analyze the current routing and staffing of EDCOE special education transportation to determine if there are any operational efficiencies that could be instituted, and provide recommendations for improvements.

FCMAT visited the county to conduct fieldwork, interview staff, and review information. This report is the result of that effort. Thank you for allowing us to serve you, and please give our regards to all the employees of the El Dorado County Office of Education.

Sincerely,



Joel D. Montero.
Chief Executive Officer

FCMAT

Joel D. Montero, Chief Executive Officer

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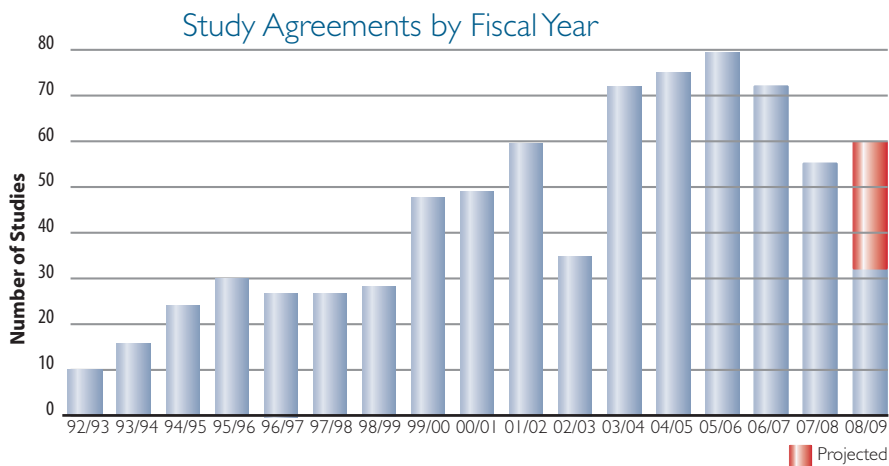
Foreword - FCMAT Background

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

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

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



Total Number of Studies.....743

Total Number of Districts in CA 982

- Management Assistance..... 705 (94.886%)
- Fiscal Crisis/Emergency.....38 (5.114%)

Note: Some districts had multiple studies.

- Districts (7) that have received emergency loans from the state. (Rev. 1/22/09)

Introduction

The El Dorado County Office of Education provides leadership through quality service to school districts, parents, and community, as well as county office support to all school districts within the 1,710.8 square miles of El Dorado County, which is in the central foothills just East of Sacramento on the western slope of the Sierra Nevada Mountains. The county is generally composed of smaller communities with less than the statewide average population density per square mile, which was reported as 217.12 in 2000 according to the U.S. Census Bureau. The El Dorado County Office of Education's offices are located in Placerville with regional program sites throughout the county.

The county office provides transportation services for approximately 252 special education students to 25 program sites throughout the county daily, utilizing 34 vehicles and 34 transportation routes. According to the state Annual Report of Pupil Transportation (Form TRAN), county office vehicles traveled 1,194,231 miles in 2007-08.

School district personnel from participating districts indicate they are pleased with the county office's transportation services. The county office historically has not charged back the excess expense for transportation services to school districts in the El Dorado County Office of Education Special Education Local Plan Area (SELPA). However, these excess costs are increasing due to issues such as fluctuating fuel prices and statutory employee costs, and therefore the issue is currently under discussion between the County Superintendent and participating school district superintendents.

The county office wants to ensure its transportation program operates as efficiently as possible for the SELPA school districts. In December 2008, the county office entered into an agreement with the Fiscal Crisis and Management Assistance Team (FCMAT) for a study to perform the following:

1. To analyze the current routing and staffing of EDCOE special education transportation to determine if there are any operational efficiencies that could be instituted, and provide recommendation for improvements.

The County Superintendent also indicated he wants FCMAT's opinion on whether the county office provides special education transportation services in the most efficient possible manner.

Study Team

The FCMAT study team was composed of four members:

William Gillaspie, Ed. D.
FCMAT Management Analyst
Bakersfield, CA

Leonel Martínez
FCMAT Public Information Specialist
Bakersfield, CA

Michael Rea*
Executive Director
West County Transportation Agency
Santa Rosa, CA

Bud Bankston*
Director of Transportation
Kern High School District
Bakersfield, CA

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

*As members of the study team, these consultants were not representing their school districts or joint transportation agency.

Study Guidelines

In January 2009, FCMAT members visited the El Dorado County Office of Education to interview personnel, examine the transportation facilities, collect data and review documents. This report is the result of those activities and is divided into the following sections:

- I. Executive Summary
- II. Routing
- III. Staffing
- IV. Fleet Condition and Use

Executive Summary

The El Dorado County Office of Education provides county office support to all school districts within the 1,710.8 square miles of El Dorado County. However, the county office provides special education transportation only to member districts in the county office Special Education Local Planning Area (SELPA), which excludes the Lake Tahoe Unified School District.

The county office daily uses 34 vehicles and 34 routes to transport approximately 252 special education students to 25 program sites throughout the county. According to the state Annual Report of Pupil Transportation (Form TRAN), county office vehicles traveled 1,194,231 miles in 2007-08. All special education students provided with transportation support services by the county office have these services identified in their Individualized Education Programs (IEPs).

The number of buses and fleet vehicles utilized to transport these special education students is reasonable when compared with the number used by similarly sized programs throughout the state based on documented data. According to the 2007-08 state TRAN report, the county office spends \$1.79 per student per mile for transportation services, or approximately \$8,500 per student annually. With an encroachment of 57.63% on the general fund for the 2007-08 school year, the county office is slightly above the statewide average encroachment of 55%. As shown in the following table, the county office has experienced only moderate increases in its student population in the last few years.

Year	Student Population
2002-03	228
2003-04	240
2004-05	234
2005-06	250
2006-07	251
2007-08	252

School district personnel indicated they are pleased with the transportation services provided by the county office SELPA. The county office historically has not charged back excess expenses for transportation services to the districts in the SELPA. However, these excess costs are increasing and are under discussion between the County Superintendent and participating district superintendents. There are plans to implement a moderate percentage or dollar charge-back to districts sometime after 2009-10. FCMAT was not requested by the county office to review any type of strategy or formula specific to a charge-back strategy.

The county office requested that FCMAT review the transportation program to ensure it is operated as efficiently as possible for the SELPA school districts.

According to its 2007-08 TRAN report, the transportation program had a budget of \$2,146,509, and the county office received \$537,918 in state special purpose apportionment funding. According to source documents, the county office received \$205,451 in revenue for transportation services provided to district students attending programs in the same district and \$166,210 for transportation services provided to the Alta Regional Center, a noncounty-office program for disabled adults attending the Mother Lode Rehabilitation Enterprises (MORE) Center. In total, the county office received \$909,579 (42.37%) in revenue as compared to the total cost of expenditures of \$2,146,509, resulting in an excess cost of 57.63%. That percentage is near the statewide average of 55%.

The County Superintendent indicated that the county office wants to continue providing the following services:

- For participating SELPA districts, special education transportation service to all county-office-sponsored programs
- For requesting county districts, transportation for district special education students attending the same district's programs at the current fee of \$49.75 per student per day regardless of whether the student is transported.
- For the Regional Center, a fee-based service at the contract rate of \$58.53 per day charged only when the client is transported.

The county office has committed a substantial number of resources to maintain and consistently replace aging vehicles. The transportation program relies heavily on passenger vans to travel the remote and often rough terrain common on county office routes. The transportation program operates 34 student routes, seven using school buses and 27 using passenger vans. The current vehicle replacement plan should be reviewed and modified to address the high mileage accumulated by the transportation program in general and the exceedingly high mileage accumulated by several vehicles in particular.

FCMAT reviewed a previous FCMAT report developed for the El Dorado County Office of Education issued in 1996 and found that little has changed in some areas. All county office drivers are still guaranteed eight hours of work per day, and drivers are allowed to drive their work vehicles home, a practice commonly referred to as "park-outs." It is unusual for a program of this size and type to require 34 full-time equivalent (FTE) drivers each to receive eight hours of daily work. Staff members continue to route buses manually, using a system that assigns drivers by considering the location of students to both a satellite location and a driver's personal home. The county office should seriously consider implementing industry-standard, packaged routing systems. These systems would substantially ease the burden of developing routes manually, ensure optimization

of route design for greatest efficiency, potentially route students using computerized directions through electronic mapping, and remove the inherent tendency to route by driver preference to facilitate personal use of county office vehicles.

The county office operates a 34-route transportation program with one Transportation Supervisor and one Lead Driver supporting and supervising 34 route drivers as well as the substitute driving staff. The Lead Driver drives only in a substitute capacity as needed, and the position's duties resemble those otherwise designated as a Dispatcher or Scheduler in most LEAs. The county office should consider reclassifying the Lead Driver to better represent this position's actual duties.

Findings and Recommendations

Routing

The El Dorado County Office of Education does not use a formal routing method for its transportation program. County office transportation personnel develop routes manually without the use of routing software to help optimize route paths and delivery times. There is also no indication that a manual, push-pin mapping sequence is used to visually display and compare routes. Routing appears to be accomplished successfully and efficiently because of both the internal knowledge possessed by long-time staff members and the fact that the county office allows drivers to build guaranteed eight-hour routes which includes the cost of full health and welfare benefits. Although FCMAT believes the latter practice does not ensure complete efficiency of all routes, there is no gross inefficiency regarding the number of students transported and number of vehicles used.

The number of vehicles utilized to transport special education students is within the standards observed at similar operations. However, it is unusual to find a program of this size that guarantees each driver eight hours of work per day. The potential exists to reduce many county office routes to less than eight hours, resulting in some compensation and benefit savings to the county office. This could reduce the COE's excess cost for the special education transportation program.

With the assistance of the Lead Driver, the Transportation Supervisor creates a route's general design based on a student's program assignment and address. Student information is handwritten on index cards that are divided into potential routes. Two senior staff drivers assign the groupings of student cards to drivers who live 10 miles or less from one of the eight established satellite sites. Satellite sites are generally school district or county office facilities that act as geographical landmarks to facilitate the calculation of travel measurements in computing driver pay. Once routes are assigned to the driving staff, individual drivers create specific routing instructions, ordering student pick-up and delivery as well as determining the route path. Individual drivers also inform parents of pick-up and delivery times. Although a twice-a-year driver bidding process was adopted since FCMAT's 1996 report recommended the change, other practices are still in place. Drivers select routes based on seniority, and these routes were organized by the same drivers to best meet their hourly schedules. As a result, 34 drivers were either hired under the assumption that they would have eight-hour workdays, or have routes that have lengthened in time to up to eight hours and never been reduced.

To avoid compensating drivers for driving to work from home, the county office uses eight satellite parking locations. Drivers rarely park at these locations. Instead, they are permitted to incorporate satellite travel time into their individual routes when they don't return to their individual homes in the morning.

The county office allows drivers to park their vehicles at home provided they live within 10 miles of one of the satellite locations. However, all eight established satellite locations are within 10 miles of the residences of most county office staff members, who generally reside in greater Placerville. Because of this arrangement, almost all staff members drive their assigned vehicles home. In one case, a driver who lived slightly more than 10 miles from a satellite site was still permitted to “park-out” the assigned vehicle because the driver is also a special education parent who transports his or her own child, saving the county office money. Travel time from a driver’s last drop-off point in the morning to the assigned satellite point is incorporated into route time, but drivers almost never return to the satellite point, instead traveling to their homes or performing other nearby activities. As a result, these drivers may be paid for travel time that they do not actually complete.

Interviews with employees and a review of a sample of the Transportation Department’s time-on-duty forms suggested that most drivers have eight-hour driving assignments. Further review found that 15 routes are less than eight hours long, resulting in 14.5 hours daily in potential overpayments to employees. Based on 180 school days at step one of the van driver pay range, this amounts to approximately \$33,355 in potential overpayment of drivers. This situation may have been caused because routing was not reduced as students were dropped from routes or transferred as well as the county office’s practice of allowing drivers to build guaranteed eight-hour routes.

The county office agreed in the classified bargaining contract to maintain any specific route increase for the duration of the bid period in which the increase was made. The county office does not prepare for the next driver bidding cycle by adjusting route times as they increase or decrease. It is essential to regularly monitor routes to maintain efficiency. The county office should implement the practice of regularly adjusting route times as needed to ensure that routes are bid at the shortest amount of time necessary for completion. Times typically fluctuate a great deal in special education door-to-door routing. The addition or deletion of one student can greatly alter the timing of a route.

Time-on-duty forms for some drivers indicate that time worked may have exceeded eight hours of work per day without drivers being paid overtime and without having these forms balanced to ensure drivers worked an average of eight hours on all work days. It is challenging to verify the driver times worked daily as documented on these forms because of the practice of allowing drivers to build guaranteed eight-hour routes..

Because of the county office’s topography, it makes economical sense to permit some route drivers to report to and from work directly from their homes. Since most county office drivers live in greater Placerville, the county could decrease its labor costs by creating one or more central terminal parking locations for buses.

Recommendations

The county office should:

1. Review the available routing software packages to assist in routing design and increase efficiency.
2. Monitor each route for efficiency, reducing and increasing route time as students are transferred to and from individual routes, and adjust route bid times accordingly.
3. Ensure it prepares for biannual route bidding by decreasing the time length of routes as appropriate to help manage labor expenses.
4. Eliminate the practice of allowing drivers to build guaranteed, eight-hour routes prior to biannual bids.
5. Review the benefit of maintaining the satellite locations for computation of drivers' paid time.
6. Consider the financial savings of establishing one or two central terminal points for housing county office vehicles and eliminate the practice of "park-outs" where this is possible and financially beneficial.
7. Implement the use of a time sheet that accurately reflects driving staff route time and approved nondriving time as well as readily identifying and accurately reflecting driver daily assignments.

Staffing

The county office operates 34 routes utilizing seven school bus drivers and 27 van drivers to transport approximately 252 special education students daily. The transportation program is supervised by the Transportation Supervisor, who is assisted by one Lead Driver. There are 34 school bus and van drivers and five substitute drivers. The transportation services program is under the direction of the Executive Director for Special Services. The county office does not employ vehicle maintenance staff since maintenance is performed through an outside contract.

The county office should consider reclassifying the Lead Driver position to better represent the work performed. The Lead Driver drives only as a substitute when required. The typical duties of this position include scheduling, routing, dispatching and telephone communication. The position is more representative of a Dispatcher or Scheduler by classification.

Driver in-service is performed by outside contract through the Placerville School District Driver Instructor. The Instructor indicated that county office school bus drivers appropriately maintain their California Department of Education required annual in-service training and renewal requirements as documented on state training record T-01. Although the county office provides up to three in-service days annually for its van drivers, it may be beneficial to provide additional defensive driver training programs for these drivers throughout the contract year. This would ensure they receive continuous refresher training similar to that required for certified school bus drivers. The contracted Driver Instructor with Placerville School District could provide this instruction as deemed appropriate.

Recommendations

The county office should:

1. Consider reclassifying its Lead Driver position to more closely reflect the actual duties performed.
2. Implement a van driver training program to include regularly monthly scheduled in-services for all county office van drivers similar in design to that provided to certified school bus drivers.

Fleet Condition

The county office transportation program operates seven school buses and 27 vans, including 22 Astro vans, one Safari van and four GM Express vans. The county office also operates two spare school buses and two spare passenger vans. Five buses have odometer readings of more than 300,000 miles, and three have readings of more than 400,000 miles. Eighteen vans have odometer readings of more than 200,000 miles, and three have readings of more than 300,000 miles. The mileage on the passenger vans is extremely high, and the vehicles likely are approaching their useful life expectancy. These vehicles are noncommercial and lightweight in design, similar to those used by typical motorists. The high-mileage school buses are “cut-away” units composed of a bus body attached to a small- or medium-sized van chassis. These units are high in mileage and probably relatively expensive to operate. Although the county office consistently replaces aging, high-mileage vans and buses, it should consider a more aggressive replacement plan. A fleet inventory is on file with the county office.

Because the transportation program depends heavily on passenger vans, the county office should continue replacing the vans with heavier duty vans, similar to the 2007 eight passenger Chevrolet Express vans currently in its fleet. These units typically provide longer, more reliable service.

All county office vehicle maintenance is performed through outside contract with the Placerville School District Transportation Department at a labor rate of \$62 per hour and an overtime rate of \$93 per hour. Few mechanical problems or repairs require overtime work. The vehicle maintenance contract between the county office and Placerville Elementary appears beneficial to both organizations. Furthermore, the district’s vehicle maintenance capabilities are sufficient to meet the county’s contractual needs. The district’s vehicle maintenance program can also provide the expertise needed to maintain school buses as required under Title 13 as well as the knowledge necessary to implement a preferred preventative maintenance program.

Recommendations

The county office should:

1. Revise its vehicle replacement plan to expedite the replacement of high-mileage vans and school buses.
2. Consider developing a financing plan for the immediate replacement of high-mileage vehicles with the least immediate fiscal impact so the expense can be spread over a specified financing period.

Appendix

A. *Study Agreement*

FCMAT

FISCAL CRISIS & MANAGEMENT
ASSISTANCE TEAM

CSIS California School Information Services

FISCAL CRISIS & MANAGEMENT ASSISTANCE TEAM STUDY AGREEMENT November 18, 2008

The FISCAL CRISIS AND MANAGEMENT ASSISTANCE TEAM (FCMAT), hereinafter referred to as the Team, and the El Dorado County Office of Education, hereinafter referred to as the COE, 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 COE has requested that the Team provide for the assignment of professionals to study specific aspects of the County operations. These professionals may include staff of the Team, County Offices of Education, the California State Department of Education, school districts, or private contractors. All work shall be performed in accordance with the terms and conditions of this Agreement.

2. SCOPE OF THE WORK

A. Scope and Objectives of the Study

- 1) To analyze the current routing and staffing of EDCOE special education transportation to determine if there are any operational efficiencies that could be instituted, and provide recommendations for improvements.

B. Services and Products to be Provided

- 1) Orientation Meeting - The Team will conduct an orientation session at the COE to brief COE management and supervisory personnel on the procedures of the Team and on the purpose and schedule of the study.
- 2) On-site Review - The Team will conduct an on-site review at the COE office and at school sites if necessary.
- 3) Progress Reports - The Team will hold an exit meeting at the conclusion of the on-site review to inform the COE of significant findings and recommendations to that point.
- 4) Exit Letter - The Team will issue an exit letter approximately 10 days after the exit meeting detailing significant findings and recommendations to date and memorializing the topics discussed in the exit meeting.

- 5) Draft Reports - Sufficient copies of a preliminary draft report will be delivered to the COE administration for review and comment.
- 6) Final Report - Sufficient copies of the final study report will be delivered to the COE following completion of the review.
- 7) Follow-Up Support – Six months after the completion of the study, FCMAT will return to the COE, if requested, to confirm the COE's progress in implementing the recommendations included in the report, at no cost. Status of the recommendations will be documented to the COE in a FCMAT Management Letter.

3. PROJECT PERSONNEL

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

- A. Dr. William Gillaspie, FCMAT Chief Management Analyst
- B. Michael Rea, FCMAT Transportation Consultant
- C. Bud Bankston, FCMAT Transportation Consultant
- D. Timothy Purvis, FCMAT Transportation Consultant

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

4. PROJECT COSTS

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

- A. \$500.00 per day for each Team Member while on site, conducting fieldwork at other locations, preparing and presenting reports, or participating in meetings.
- B. All out-of-pocket expenses, including travel, meals, lodging, etc. Based on the scope of work identified in section 2 A, estimated total cost is \$14,000. The COE will be invoiced at actual costs, with 50% of the estimated cost due following the completion of the on-site review and the remaining amount due upon acceptance of the final report by the COE.
- C. Any change to the scope will affect the estimate of total cost.

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

5. RESPONSIBILITIES OF THE COE

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

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

6. PROJECT SCHEDULE

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


<i>Orientation:</i>	<i>(estimated timeline to begin in January 2009)</i>
<i>Staff Interviews:</i>	<i>to be determined</i>
<i>Exit Interviews:</i>	<i>to be determined</i>
<i>Preliminary Report Submitted:</i>	<i>to be determined</i>
<i>Final Report Submitted:</i>	<i>to be determined</i>
<i>Board Presentation:</i>	<i>to be determined</i>
<i>Follow-Up Support:</i>	<i>If requested</i>

7. CONTACT PERSON

Please print name of contact person: Francie Heim, Deputy Superintendent

Telephone 530 295-2221, ext 2221 FAX 530 621-2543

Internet Address fheim@edcoe.org


Francie Heim, Deputy Superintendent
El Dorado County Office of Education

11/24/08
Date



November 18, 2008

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