

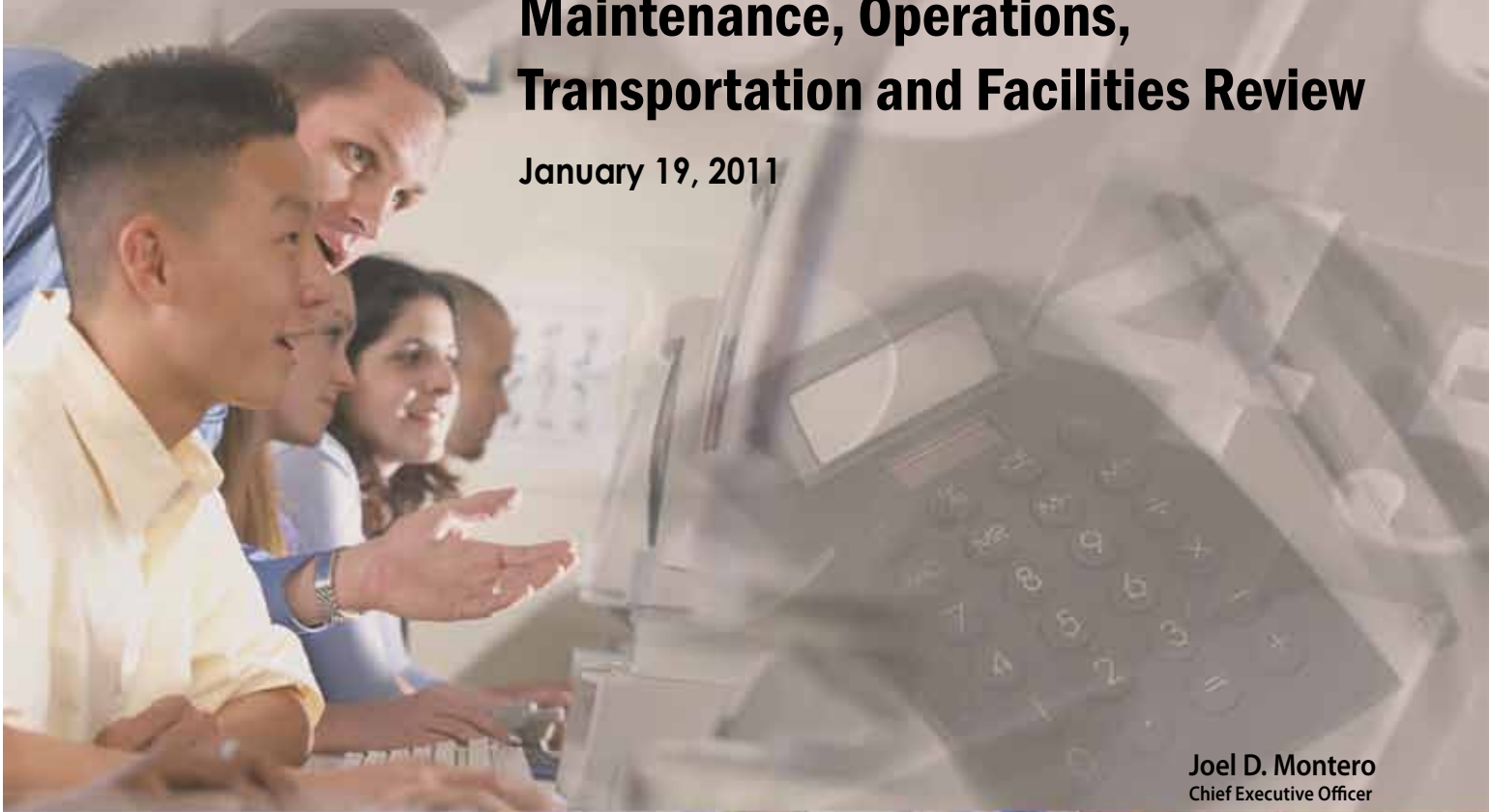


**CSIS** California School Information Services

# King City Jt. Union High School District

## Maintenance, Operations, Transportation and Facilities Review

January 19, 2011



**Joel D. Montero**  
Chief Executive Officer







**CSIS California School Information Services**

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January 19, 2011

John Bernard, Ed.D., State Administrator  
King City Jt. Union High School District  
800 Broadway  
King City, California 93930

Dear Dr. Bernard,

In October 2010, the King City Jt. Union High School District and the Fiscal Crisis and Management Assistance Team (FCMAT) entered into an agreement for a maintenance, operations, transportation and facilities review. Specifically, the agreement stated that FCMAT would perform the following:

1. Conduct a review of the custodial department practices and procedures and make recommendations based upon best practices to improve efficiency.
2. Review custodial materials and equipment and make recommendations for improvement if needed.
3. Review custodial, grounds, and maintenance staffing levels and work schedules and make recommendations to improve efficiency.
4. Review bus routes and schedules and make recommendations to improve efficiency.
5. Review staffing levels of transportation department and make recommendations for cost containment.

The attached final report contains the study team's findings and recommendations in the above areas of review. We appreciate the opportunity to serve the King City Jt. Union High School District and extend our thanks to all the district staff for their assistance.

Sincerely,

Mary Barlow  
Deputy Administrative Officer

**FCMAT**

Joel D. Montero, Chief Executive Officer

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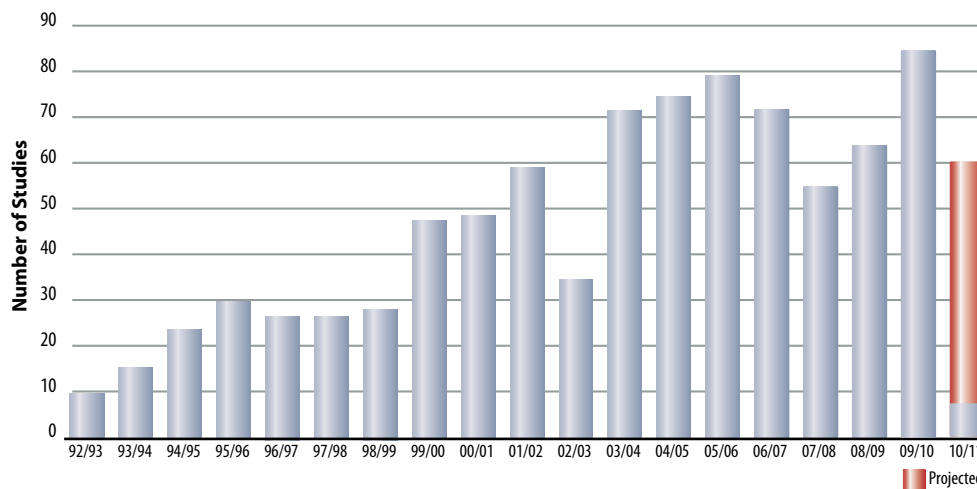
# About FCMAT

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.

**Study Agreements 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 office 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

The King City Joint Union High School District serves students in the 9th through 12th grades and is situated in the southern portion of Monterey County. The district encompasses approximately 2,500 square miles. The district operates two comprehensive high schools, one in King City and the other in Greenfield; a charter school located in Greenfield; and a continuation high school located in King City. The district's enrollment for the 2009-10 school year was 2,134.

In July 2009 SB 130 was signed authorizing a state loan of up to \$13 million from the I-Bank. SB 130 further required the superintendent of public instruction to assume all the rights, duties and powers of the Governing Board and to appoint a state administrator to act on his behalf. The district is governed by John Bernard, Ed.D., the appointed state administrator. The bill authorizes the state administrator to contract for services and staff to conduct reviews and provide specified assistance to the state administrator in meeting progress toward recovery. On October 19, 2010, the district contracted with FCMAT to review the Maintenance, Operations, Transportation and Facilities Department. The scope and objectives of the study are as follows:

1. Conduct a review of the custodial department practices and procedures and make recommendations based upon best practices to improve efficiency.
2. Review custodial materials and equipment and make recommendations for improvement if needed.
3. Review custodial, grounds, and maintenance staffing levels and work schedules and make recommendations to improve efficiency.
4. Review bus routes and schedules and make recommendations to improve efficiency.
5. Review staffing levels of transportation department and make recommendations for cost containment.

## Study Team

The study team was composed of the following members:

|  |                                     |
|--|-------------------------------------|
| Kirk Gilbert*                          | Michael Rea*                        |
| Director of Maintenance and Operations | Executive Director                  |
| Tehachapi Unified School District      | West County Transportation Agency   |
| Tehachapi, California                  | Santa Rosa, California              |
| Mary Barlow                            | Laura Haywood                       |
| FCMAT Deputy Administrative Officer    | FCMAT Public Information Specialist |
| Bakersfield, California                | Bakersfield, California             |

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

## Study Guidelines

FCMAT visited the King City Joint Union High School District on November 8-9, 2010 to conduct interviews, collect data and review documents. This report is a result of these activities and is divided into the following sections:

- Executive Summary
- Transportation Finance
- Transportation Operations
- MOTF Staffing and Organization
- MOTF Operations
  - Director Position
  - Training and Safety
  - Policies and Procedures Manual
  - Electronic Work Order System
  - Vehicle and Equipment Replacement
  - Five-Year Deferred Maintenance Program
  - Preventative Maintenance
  - Procurement of Supplies
  - Employee Morale

# Executive Summary

School transportation in California has not been fully funded since the late 1970s. Revenue for school transportation was capped in the 1982-83 school year and since that time has only occasionally received a cost of living adjustment (COLA). The King City Joint Union High School District receives funding for home-to-school transportation that is, on average, higher per pupil than most school districts in California. Some districts in California charge fees for home-to-school transportation, usually utilizing the same criteria that determines eligibility for free or reduced price lunches. With a reported population of approximately 70% of the district's students qualifying for free or reduced price lunches, it likely would cost more to administer the program than the revenue received. Therefore, the district should not proceed with implementing a fee for transportation.

The district should consider tracking the actual transportation operational costs. Mechanics should use work orders to track labor, parts and fluids used to maintain the maintenance and operations department vehicles and costs should be charged to that department. Field trips are currently charged using the state-reported cost per mile. A new rate should be developed that charges a mileage component based on the actual cost to operate the bus on the trip, and an hourly component reflecting the average driver salary.

The district operates four home-to-school routes and three special education routes. These routes have relatively low ridership, and could be consolidated to three routes. Board policy stipulates a two-mile walking distance, but in some areas of the district students must travel much farther than stated board policy to receive bus transportation. The policy should be revised to reflect the approved service level. The three special education routes might be able to be consolidated, which would result in reduced operating costs.

The vehicle maintenance program appears to comply with laws and regulations. School bus driver training and record-keeping also appears to be in compliance. Many student trips are accomplished in district-owned vans with teachers or coaches driving. These vehicles should be maintained to the same standards as school buses. The drivers should be enrolled in the DMV Pull Notice program, and the district should consider enrolling them in a drug and alcohol testing program similar to the school bus drivers. This program is designed for commercially licensed bus drivers, but districts across the state use it for all staff that drive a district vehicle.

Most maintenance and operations positions also drive a school bus. The staff perform the time-sensitive school transportation duties quite responsibly, but do not systematically perform other duties productively. As a result, the maintenance and operations functions are suffering. These positions should be separated so that maintenance, grounds and custodial worker positions are distinct from bus driver positions. FCMAT compared staffing to CASBO recommendations and found that the district is staffed well below the CASBO standard. If fully implemented, FCMAT's recommendations would increase staffing of the maintenance, operations, transportation and facilities functions by 3.5 FTE. Recommendations include how the department should be reorganized and staff should be allocated to each comprehensive high school, along with recommendations to address areas of weakness in the MOTF department operations.

Reorganizing the department and revising job descriptions will provide better definition of job duties and clarity of responsibilities. As with any transition, this will require time for staff to understand and adopt new roles, responsibilities and procedures.



# Transportation Finance

School transportation in California has been severely underfunded for nearly three decades. Until 1977, California fully reimbursed school districts for their reported school transportation operational costs but never funded capital costs. At that time the electorate approved Proposition 13, which severely reduced the property tax revenue available to support schools and other local government agencies. From 1977 to the 1982-83 fiscal year, the state gradually reduced the percentage of reimbursement to school transportation. In 1982-83, the state capped the amount that each school district received based on 80% of what they reported in that year, and only occasionally have granted a cost of living adjustment (COLA) to the fund. Consequently, as school transportation costs have increased and the funding has not kept pace, most school districts experience a gap between their operational costs and the revenue received from the state. Districts cover the gap with general funds. In the 2008-09 fiscal year state funding only covered 45% of the total reported school transportation operational costs. In the 2009-10 fiscal year the state reduced the funding by 19.84%, and in 2010-11 by 19.81%. In this year the state funding meets approximately 35% of the statewide total cost of school transportation. Because the funding amount was capped at each district's reported costs for 1982-83, school districts that have experienced growing enrollment have not received any additional funding, and those with declining enrollment continue to receive funds relative to that base year.

School districts annually report their prior year costs as part of the unaudited actuals financial report in the state's Standardized Account Code Structure (SACS), and transportation costs are reported as a part of this on a TRAN form. Below is an excerpt of key cost data for the past three years:

## *King City Joint Union High School District*

### Home-to-School TRAN Data

|                     | 2007-08      | 2008-09       | 2009-10      |
|---------------------|--------------|---------------|--------------|
| Buses               | 9            | 14            | 17           |
| Pupils Transported  | 176.1        | 166.6         | 138.4        |
| Pupils w/ IEP       | 14.4         | 18.6          | 6.6          |
| Mileage             | 93,276       | 86,697        | 77,715       |
| Cost/Mile           | \$5,672      | \$5,864       | \$8,532.00   |
| Cost/Pupil          | \$3,004.51   | \$3,051.57    | \$4,790.73   |
| Approved Cost       | \$673,610.15 | \$ 514,907.54 | \$663,036.82 |
| State Apportionment | \$351,809.00 | \$351,809.00  | \$282,004.00 |
| Encroachment        | 47.77%       | 31.68%        | 57.46%       |

The above data indicates that the district receives a comparatively high state funding amount.

Home-to-school transportation in California is not mandated, but provided at the will of the district and according to board policy. Special education transportation is mandated as a related service and stipulated in each student's individualized education program (IEP). As noted above, some special education students were transported in regular education home-to-school buses. The rest of the special education students were transported by the Monterey County Office of Education and the district is charged for that service. The district does not receive any funding for special education transportation. District officials reported that in 2009-10 they notified Monterey COE of their intention to take back two severely disabled classes from the Monterey

COE and to begin transporting those students in 2010-11. The district anticipates an overall savings relative to this program and transportation take-back.

The California Supreme Court ruled in 1992 that charging fees for pupil transportation was legal. The state adopted rules and annually publishes guidance relative to this issue. Students who are indigent and those who receive special education transportation are exempt from paying fees. Most districts utilize the same criteria for transportation fees as they use to qualify students for free or reduced price lunches. The district reports that approximately 70% of its students qualify for free or reduced price lunches, so the cost of administering and issuing passes would exceed the revenue that could be collected.

The district has made a concerted effort to appropriately separate costs between the maintenance and operations budget and the transportation budget. Fuel is meticulously accounted for and the appropriate departments are charged for their fuel use. Employee time is reasonably divided between the departments as well, with the exception of the mechanic positions.

The two mechanics' time is charged entirely to the transportation department. When the mechanics work on a vehicle or piece of equipment for the maintenance and operations department, their time is not separated or charged appropriately. In addition, oil, other vehicle fluids, and miscellaneous parts used on operations and maintenance vehicles and equipment are not charged to the appropriate department. The transportation department should adopt a work order system to appropriately identify charges for labor time, parts, and fluids.

Field trips are charged to the schools or athletic departments at a rate of \$8.53 per mile, which was the 2009-10 TRAN cost per mile. This rate does not accurately reflect the cost to provide field trips. It includes all costs to operate the transportation department, rather than the variable cost to operate a field trip. A new rate should be calculated that reflects the actual bus operating cost. There should be two components to this rate, a mileage charge and an hourly charge. The mileage charge should reflect the per-mile cost of operating the bus, including the cost of fuel. The hourly rate should be the cost of the employee. It is easiest to develop an average hourly rate, as some trips will be accomplished in overtime status, while others will not. Calculating the exact hourly charge for each driver for each trip would be cumbersome and time-consuming. Schools that utilize district vans for trips are charged \$0.50 per mile.

## Recommendations

*The district should:*

1. Utilize work orders to charge labor, parts and fluids to maintenance and operations vehicles.
2. Calculate and utilize a field trip rate that includes the specific mileage and time to operate the bus.
3. Continue to monitor special education transportation costs. Ensure that transportation administration is conferred with prior to IEP meetings when determining transportation needs.

# Transportation Operations

The King City Joint Union High School District operates four regular home-to-school routes and three special education routes. The routes, their daily hours and average daily ridership are as follows:

## *King City Joint Union High School District*

### 2010-11 School Bus Routes

| Route Number | Daily Hours | Average Daily Ridership |
|--------------|-------------|-------------------------|
|--------------|-------------|-------------------------|

#### Home-to-School Bus Routes

|    |      |    |
|----|------|----|
| 5  | 5.25 | 43 |
| 14 | 3.5  | 35 |
| 12 | 2.75 | 42 |
| 3  | 3.75 | 38 |

#### Special Education Bus Routes

|    |     |    |
|----|-----|----|
| 15 | 3.0 | 2  |
| 8  | 4   | 7  |
| 13 | 3.0 | 10 |

Consolidating bus routes is difficult because of the effects on students and parents. The district serves a rather large geographic region, so consolidating bus routes will result in longer bus trips for some students. However, the relatively low average daily ridership of the regular home-to-school bus routes indicates that some consolidation of bus routes is feasible. Ridership will fluctuate depending on students' involvement in after-school sports, and that must be considered when studying consolidation. Bus routes 12 and 14 serve a relatively proximate geographic area. Route 14 serves an area south of King City and just east of Highway 101. Route 12 serves an area that is east of King City and slightly south. Route 3 serves an area that is south and east of King City.

It is feasible that routes 12 and 14 could be consolidated, with some of the bus stops taken by route 3, if necessary. The district has many options, and could consolidate routes 3 and 12, or 3 and 14, or reconfigure all three routes. If a route is eliminated it would create at least one route with a slightly higher total time, and an increase of no more than 20 minutes of ride time for the most distant students. However, consolidation can result in savings from a reduction in staff and parking one bus.

FCMAT did not conduct a full routing study. A routing study would require spending significant time in the district and riding all routes, and was not in the scope of this study. District staff will need to review the routing details and be open to thinking about what can be done to reduce routes.

Board policy stipulates a two-mile walking distance or non-service zone. Typically that walking distance could be the distance to a school or the distance to travel to a bus stop. Transportation department staff report that there have been significant bus route reductions over time and that

relatively large areas of the district are not served. The district may wish to consider revising board policy to reflect the actual service provided.

The district should also explore the consolidation of special education bus routes. There are two wheelchair students on route 15 and two on route 8. The consolidation would most likely be constrained by the availability of wheelchair tie-down locations on buses. Bus 8 has a capacity of 30 ambulatory students and 4 wheelchair positions, but there are no spare special education buses with a similar number of student seating locations. The students on route 15 attend King City High School and the students on route 8 attend Greenfield High School. The consolidation could be accomplished if the schools are flexible and make accommodations to receive students earlier than bell time and supervise them after bell time until the bus arrived. The district should review the estimated potential cost savings to determine the feasibility and effectiveness of combining routes.

School transportation is governed by many regulations in the Vehicle Code, Title 5 and 13 of the California Code of Regulations, the Education Code and Title 49 of the Code of Federal Regulations. The California Highway Patrol Motor Carrier Division annually inspects buses, vehicle maintenance records, driver training records, DMV driver record information (known as the DMV Pull Notice program) and federal drug and alcohol testing program records. This annual inspection certifies the buses for operation and generates a Terminal Grade Report. The district consistently has received the CHP's highest grade, which is "satisfactory." This reflects that the district's transportation program complies with the applicable laws and regulations.

FCMAT reviewed vehicle maintenance records and driver training records and found them to be well-organized and generally in compliance with laws and regulations. One driver's training record, however, did not have the most recent record of a physical examination in the file. This information should be updated and placed in the file.

The buses are generally dirty and dusty inside and out, except for of a couple of buses that appeared to be cleaner. The engines and undercarriages of buses do not appear to be steam cleaned or pressure washed regularly, making it more difficult for mechanics to detect potential problems. In general, the bus fleet does not represent the district well.

The district operates a fleet of 17 buses for its seven bus routes. Four of the buses appear to be smaller buses primarily for special education transportation service, with the remaining buses having higher capacities for regular home-to-school transportation and field trips or athletic trips. The district has received several grants to replace buses over the years. The district also has received grants to retrofit the exhaust systems of its diesel buses to comply with the California Air Resources Board truck and bus rules that will require all of these buses over 14,000 gross vehicle weight rating to be outfitted with particulate reducing filters for their exhaust system. Although the district has excess spare buses for its operation, it is common practice for school districts to hold on to their old buses to obtain school bus replacement grants from the California Department of Education (CDE), the local air district or the California Air Resources Board. The CDE recently announced the Small School District and County Office School Bus Replacement Program for which applications are due in early 2011.

The district regularly maintains every bus in its fleet but should explore the possibility of keeping nonoperating buses in current CHP certification to benefit from such grant programs, while providing a minimum of maintenance to reduce costs.

Field trips and athletic trips are requested on a district form. Buses are utilized for many trips, but teachers or coaches can request a district van. Transportation staff reported that more trips



are being accomplished on vans due to the lower cost. Although this is the case, vans are far less safe than school buses. The district should provide defensive driving training for teachers and coaches that drive students in non-bus vehicles, should enroll each driver in the DMV Pull Notice program and consider enrolling them in a drug and alcohol testing program similar to the bus drivers. Non-bus vehicles that are transporting students should be maintained to standards similar to school buses to ensure their operational safety.

A two-way radio communication system is in place; however, the base station in the office is not turned on or used. No one monitors the two-way radio when drivers are in the field. Drivers are expected to utilize their personal cellular telephones whenever they need assistance or when there is an emergency. Although no concerns were expressed regarding this, the two-way radio system should be on and monitored when drivers are in the field, and drivers should monitor the radio in case the office needs to share critical safety information en route.

## Recommendations

*The district should:*

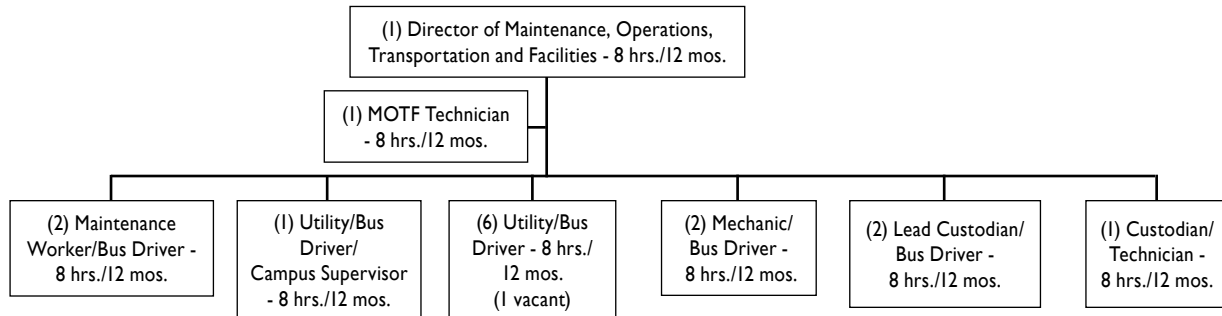
1. Review transportation maps and consider consolidating the four home-to-school routes to three.
2. Review the routes and feasibility of consolidating the special education routes from three to two.
3. Revise board policy to reflect the current transportation service level.
4. Continue to maintain vehicle maintenance records and driver training records, including recent physical examination records for drivers.
5. Improve cleanliness of the fleet by establishing a regular wash schedule that includes periodic power wash of the undercarriage.
6. Consider revising the maintenance schedule for nonoperating fleet to maintain buses in current CHP certification, while providing minimum maintenance to reduce costs.
7. Maintain district-owned non-bus vehicles that transport students to the same standards as school buses.
8. Consider training and oversight of district employees who transport students in non-bus vehicles.
9. Reinstigate the usage and monitoring of the two-way radio system to monitor and communicate with bus drivers in the field.



# MOTF Staffing and Organization

The district’s maintenance, operations, transportation and facilities staffing is composed of one FTE director, one FTE temporary MOTF technician, two FTE maintenance/bus drivers, five FTE utility/bus drivers, two FTE lead custodian/bus driver, one FTE utility/bus driver/campus supervisor, one FTE custodial technician, two FTE mechanic/bus drivers, and one vacant utility/bus driver. All but the custodian technician and MOTF technician positions are split titles, most with shared duties in transportation and facility operations.

The organization chart below reflects the current staffing of the Maintenance, Operations, Transportation and Facilities Department. Staff members generally perform multiple duties that include building maintenance, grounds maintenance, custodial service, bus driving and vehicle maintenance. The utility position generally performs grounds work and some custodial work. Most MOTF staff members hold a California special certificate valid for driving a school bus. Seven staff members regularly drive a school bus route as a part of their daily duties and others that hold the school bus certificate drive as substitutes or on field trips.



The above combined positions were designed to create full employment to attract good employees and retain bus drivers. However, FCMAT observed that the staff performed the time-sensitive school transportation duties quite responsibly, but failed to systematically perform productively in their other duties.

Although the use of local outside contractors has allowed the department to meet the demands of the districts’ immediate maintenance needs, there is a measurable amount of lost labor hours due to the shared positions. On average, seven of the split positions drive a bus or are preparing for their route from three to five hours daily. The remaining hours are allocated to the split position of utility, custodian, or maintenance worker. Most positions drive a bus in the morning and again at mid day, and in some cases an evening route. This further complicates the number of hours utilized for the second portion of the split position because there is no dedicated block of time to focus on a several-hour project. In addition, breaks and lunch periods tend to be scheduled during the nondriving hours. The schedule is shown here:\*

| <i>Schedule Breakdown (hours)</i>   | <i>Position Title</i>  | <i>Employment Status</i> |
|---|--|--------------------------|
| Employee A<br>2 p.m. – 10 p.m.  | Lead custodian/bus driver (drives only as needed)                        | 12-month                 |
| Employee B<br>6:30 a.m. – 8 a.m.<br>8 a.m. – 11:15 a.m.<br>11:15 a.m. – 12 noon | Maintenance worker/bus driver<br>Bus driver<br>Maintenance<br>Bus driver | 12-month                 |

| <i>Schedule Breakdown (hours)</i> | <i>Position Title</i>                | <i>Employment Status</i> |
|-----------------------------------|--------------------------------------|--------------------------|
| 1 p.m. – 2:30 p.m.                | Maintenance                          |                          |
| 2:45 p.m. – 3:30 p.m.             | Bus driver                           |                          |
| Employee C                        | Utility/bus driver/campus supervisor | 12-month                 |
| 5:30 a.m. – 8:30 a.m.             | Bus driver                           |                          |
| 8:30 a.m. – 10:45 a.m.            | Off                                  |                          |
| 10:45 a.m. – 11:30 a.m.           | Bus driver                           |                          |
| 11:30 a.m. – 2:45 p.m.            | Campus supervisor                    |                          |
| 2:45 p.m. – 4:30 p.m.             | Bus driver                           |                          |
| Employee D                        | Mechanic/bus driver                  | 12-month                 |
| 6 a.m. – 8 a.m.                   | Bus driver                           |                          |
| 8 a.m. – 11:30 a.m.               | Mechanic                             |                          |
| 1 p.m. – 2 p.m.                   | Mechanic                             |                          |
| 2 p.m. – 3 p.m.                   | Bus driver                           |                          |
| Employee E                        | Utility/bus driver                   | 12-month                 |
| 6:30 a.m. – 3:30 p.m.             | Utility (drives as needed)           |                          |
| Employee F                        | Utility/bus driver                   | 12-month                 |
| 2 p.m. – 10 p.m.                  | Utility (drives as needed)           |                          |
| Employee G                        | Utility/bus driver                   | 12-month                 |
| 2 p.m. – 10 p.m.                  | Utility (drives as needed)           |                          |
| Employee H                        | Utility/bus driver                   | 12-month                 |
| 6 a.m. – 8 a.m.                   | Bus driver                           |                          |
| 8 a.m. – 11:30 a.m.               | Utility                              |                          |
| 2 p.m. – 2:45 p.m.                | Utility                              |                          |
| 12:30 p.m. – 4 p.m.               | Bus driver                           |                          |
| Employee I                        | Bus driver trainer                   | Hourly                   |
|                                   | Mechanic/bus driver                  | 12-month                 |
| 6 a.m. – 8 a.m.                   | Bus driver                           |                          |
| 8 a.m. – noon                     | Mechanic                             |                          |
| 2 p.m. – 4:15 p.m.                | Bus driver                           | (15 min. extra time)     |
| Employee J                        | Utility/bus driver                   | 12-month                 |
| 6:30 – 8 a.m.                     | Bus driver                           |                          |
| 8 a.m. – 11:30 a.m.               | Utility                              |                          |
| 12:30 p.m. – 2:45 p.m.            | Utility                              |                          |
| 2:45 p.m. – 4 p.m.                | Bus driver                           | (30 min. extra time)     |
| Employee K                        | Custodial technician                 | 12-month                 |
| 2 p.m. – 10 p.m.                  | Custodial technician                 |                          |
| Employee L                        | Maintenance worker/bus driver        | 12-month                 |
| 6 a.m. – 8 a.m.                   | Bus driver                           |                          |
| 8 a.m. – 11:30 a.m.               | Maintenance worker                   |                          |
| 12:30 p.m. – 4 p.m.               | Bus driver                           |                          |

| <i>Schedule Breakdown (hours)</i>   | <i>Position Title</i>                             | <i>Employment Status</i> |
|-------------------------------------|---|--------------------------|
| Employee M<br>2 p.m. – 10 p.m.      | Lead custodian/bus driver (drives only as needed) | Position vacant          |
| Employee N<br>6:30 a.m. – 3:30 p.m. | Utility/bus driver<br>Utility (drives as needed)  | 12-month                 |
| Employee O                          | Receptionist                                      | Temporary                |

*\*All information for table supplied by district*

Those positions without regular routes fill in for absences or during field trips. This leaves very little productive time for the maintenance, custodial and grounds needs of the district.

A recent Williams report issued by the Monterey COE reported both sites were in fair condition and cited multiple areas of concern on both grounds, exterior of buildings and interior conditions. The grounds at each site are showing signs of neglect, particularly at King City High School. Overgrown lawns and shrub beds, trees in need of trimming and substandard conditions were evident throughout the campus. Greenfield High School is approximately ten years old and in much better condition than King City High School. However, with one part-time grounds worker at each site, trying to keep pace with the demands of a comprehensive high school including preparation of all athletic fields, both campuses are starting to show signs of neglect. The district should also explore the option of hiring extra summer help to address the issues of pruning, aerating, weeding, and light tree trimming. This is a very common practice among districts and an effective way to help manage the workload of the grounds department.

Daytime custodians are not assigned to either high school to respond to immediate needs in case of student illness or injury and to clean up hazardous fluid or deal with blood-borne pathogens. In addition, the absence of daytime custodians leaves the sites with large amounts of trash generated from lunch sessions. The district assigns utility positions and campus supervisors to clean the campus during the day. It was reported by several staff members to FCMAT that on occasion the trash from lunch does not get cleaned up until the evening custodial staff begins their shift at 2 p.m.

Combined job descriptions are generally paid at the rate of the highest skill required for the job. For example, a skilled maintenance worker or vehicle mechanic should generally be paid more than a school bus driver, and a school bus driver should generally be paid more than a custodian. This practice of combining jobs generally will cost the district more than if the duties were separated and the pay reflected the required skill set.

The district's salary schedule reflects a first step salary for custodian at \$13.15, utility/bus driver at \$14.52, maintenance worker/bus driver at \$16.42 and a mechanic/bus driver at \$17.69. As noted above in many of these cases, the incumbent spends half or more of their time driving a school bus and less time working in the higher classifications, so the district is effectively overpaying for the bus driving work.

The staffing should be reorganized to increase productivity, particularly in the maintenance, grounds and custodial responsibilities. The recommended alignment would effectively separate bus driving from the other responsibilities and create maintenance and operations technicians that are assigned to that area of responsibility.

Based on the information provided by the district and the current vacancies, the custodial department is staffed at approximately 60% of generally accepted standards when measured by the

California Association of School Business Officials (CASBO) statewide custodial formula. The CASBO formula factors in the square footage of sites and the number of students, staff, classrooms, offices and general purpose areas. The CASBO formula for custodial staffing is as follows:

Add together the total for each of the following:

- 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

Total the above and divide by four to indicate the number of custodians needed to clean and maintain a building, according to the established time lines and cleaning standards found in the CASBO custodial handbook. These guidelines are based on industry time-driven standards.

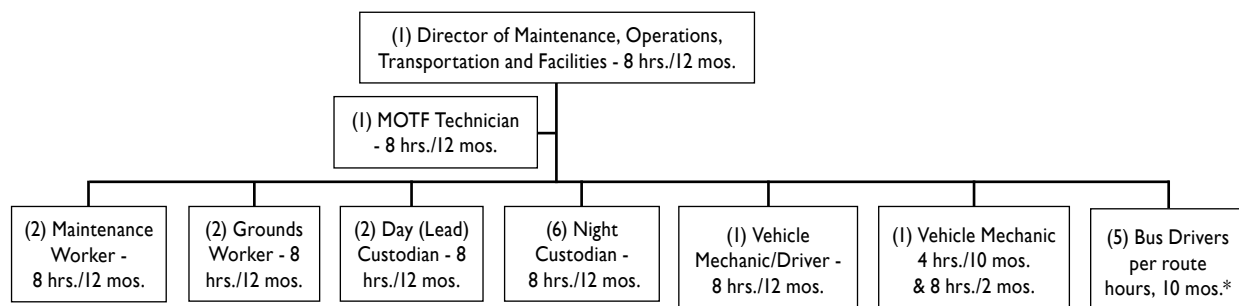
Several long-term employees reported to FCMAT that the staff shortage is the result of not properly staffing Greenfield High School when it opened in 2000-01. It was reported that the district did not hire additional staff but instead split and assigned existing staff to the new school.

Additional reductions in staff over the past several years due to attrition have also contributed to staffing shortages. The FTE shortage in the maintenance and operations department has significantly impacted the condition and cleanliness of school sites. Through numerous custodian interviews and site visits by the FCMAT team, it was evident that although the custodial staff has continued to have a positive attitude in their work efforts, the negative impact of the heavy workload is considerable.

Custodial staff report to the principal at each site. With this configuration, each school site operates independently without districtwide standardized procedures for cleaning, products used, purchasing practices, inventory control, etc. This impedes the utilization of substitutes, because much time is spent on site-specific training instead of establishing districtwide expectations.

By reorganizing and creating full-time maintenance, custodial, and grounds positions, hiring part-time bus drivers, and hiring additional custodial staff, personnel can focus on their area of expertise. This will increase accountability and ownership, and should also help address some of the health and safety issues more effectively and efficiently.

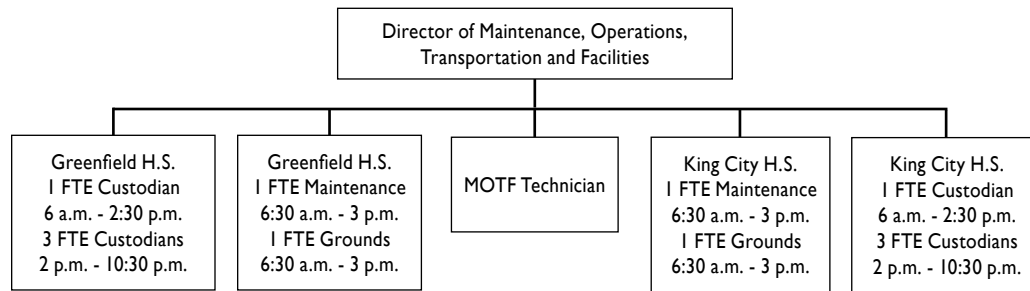
The recommended department organization chart is shown here:



\* Vehicle mechanic works remainder of hours in this classification.

This configuration focuses the staffing of maintenance, operations and facilities and fills current vacancies. Hiring approximately five part-time bus drivers increases the department by 2.5 FTE, resulting in a total increase in department staff of 2.5 FTE.

The diagram below illustrates how the maintenance and operations department staff should be allocated and the hours of operation to best maximize efficiency and effectiveness.



In this configuration the maintenance and operations staff would be split equally between King City and Greenfield high schools, with each school staffed with 1 FTE maintenance worker, 1 FTE grounds worker, 1 FTE day or lead custodian and three FTE night custodians.

The transportation department would be staffed by 1 FTE mechanic who would also provide the necessary department driver training but would not regularly drive a school bus. The other mechanic would drive a school bus route for half the day and be paid at the driver rate for that time, but work as a mechanic for the remainder of the day and during the times when school is not in session. Part-time bus drivers would need to be hired to work only the hours necessary for their bus routes.

For this reorganization to be successful, the district will have to incrementally transition to this model, ensuring that there are an adequate number of school bus drivers to cover the number of routes, meet field trip needs and substitute due to absence. It will take several months to recruit, train and certify part-time school bus drivers.

New drivers will also need to be supervised and mentored closely at the outset. It was reported that the current drivers rarely had MOTF management ride along on their routes or observe them driving the bus. This will be critical to the success of this transition.

If existing employees fill the full-time maintenance and operations positions, they may wish to retain their school bus driver licenses. This could benefit the district by having trained staff available to respond to emergencies or to act as substitutes when regular drivers are unavailable.

The 2009-10 TRAN reports salaries and benefits for home-to-school transportation as \$585,673.45, which is comparatively high for a district this size. A reconfigured transportation department with half of the director's and technician's salary and benefits being charged, three home-to-school routes, three special ed routes and 1.5 mechanic positions at the highest salary levels would cost approximately \$291,276 annually using current district payroll data. This reorganization would allow the district to more accurately track the cost of the different components of the MOTF department. Because FCMAT is recommending an increase in the total number of FTE, the actual increase in total operational costs will be dependent on the newly negotiated salary schedules, the number of positions filled, and the experience level of the newly hired staff.

The district pays its bus driver and utility/bus driver classification at the same rate, \$14.52 per hour for Step 1. In an effort to compare this salary to other local school districts, FCMAT contacted the following school districts to ascertain their first step salary for school bus drivers. This comparison is important to ensure that the district's bus driver salary is competitive in the local market and newly trained bus drivers can be retained. All changes to job descriptions and salary schedules are subject to negotiation with the bargaining unit.

| District                              | First Step School Bus Driver Salary |
|---------------------------------------|-------------------------------------|
| Alisal Union School District          | \$13.11                             |
| Greenfield Elementary School District | \$11.91                             |
| Gonzales Unified School District      | \$11.96                             |
| Salinas Elementary School District    | \$14.43                             |
| Salinas Union High School District    | \$14.86                             |

## Recommendations

*The district should:*

1. Reorganize department staffing to create separate school bus driver positions.
2. Fill the newly created MOTF technician position.
3. Fill two FTE daytime custodial positions that have been approved and are on hold. Assign one FTE to each comprehensive school site.
4. As funding permits, implement the new organization model incrementally while maintaining sufficient staff and certificated bus drivers to meet district needs.
5. Provide management oversight and ride-along during initial training and the first several months of service.
6. Review and revise job descriptions within the MOTF department to reflect specialized duties.
7. Review and compare salary schedules of similar size districts and make adjustments as needed to the newly revised job descriptions.



# MOTF Operations

## Director Position

The director of MOTF has been with the King City High School District for 22 years. He has served the district as a director for the past 10 years. Prior to June 2009, the district shared administration with King City Elementary School District. At that time there were two director positions that split the responsibilities for the two districts. While interviewing staff it became apparent that the former director completed the responsibilities typical of a director position and that the current director completed the responsibilities of an assistant or head of maintenance. When the former director left the employ of the district, no additional training or support was provided to the current director until the appointment of the state administrator in July 2009. He has attended one conference and no other trainings that have been provided and offered by the district in the past 18 months.

Interviews indicate that staff perceive that the director is a hard-working employee with a strong work ethic. However, he does not sufficiently fulfill his administrative responsibilities and spends most of his time completing tasks that could be delegated. The director has not kept current with local, state and federal regulations pertaining to the department and its employees. For example, he did not attend the Integrated Pest Management training offered at a nearby school district in the past six months and then cited the lack of trained staff for the reason that the weeds had not been abated.

At the time of FCMAT's fieldwork, the shop areas and work sites that fall under the supervision of the director were cluttered and dirty with many broken parts and tools scattered throughout, particularly the maintenance workshop and the equipment yard. There were surplus computers and electronic equipment stacked in golf carts in the shop areas. There appeared to be no immediate plans to discard and clean these areas as they had been in this condition for extended periods of time. Staff reported a shortage of usable tools and supplies, some of which might be available if the workshop and equipment yards were properly organized and tools and equipment were inventoried and stored. The department's record-keeping and filing system was in disarray, which resulted in the department's inability to produce pertinent documentation. However, this has improved with the hiring of a temporary MOTF technician.

The district should immediately establish a plan to address the areas of concern in the maintenance, operations, transportation and facilities department. The most critical goals should include any health and safety compliance issues that may result in stiff penalties or the withholding of state funding. Several deficiencies were identified in previous Monterey COE inspections, including trip hazards and standing water that could cause an accident and injury (slip and fall). These deficiencies had been noted in several previous reports and still were not repaired. In addition to the potential loss of School Facilities Program or Deferred Maintenance funding, the district could be legally liable. An accident involving a previously identified hazard can result in a lawsuit.

The district must enumerate and communicate its short and long range goals to the director. The district should consider a mentor program to help the director achieve the stated specific goals within a given timeline and obtain the necessary knowledge to hold the position. A mentor is typically a current experienced director of MOTF in another district that can be hired on a consultant basis. This person should be available to meet with the director regularly at the school sites. Communication between the mentor and the superintendent or chief business official is

crucial throughout this process. These goals must be attained in a timely manner to provide the students and staff of the district with a clean, safe and comfortable working and learning environment.

The director must establish a network of resources to call on as questions or concerns arise. The county office is often a good source for local support. In addition, the director must attend conferences and trainings to further his education and knowledge base; the Coalition for Adequate School Housing (CASH) and CASBO are two organizations that sponsor workshops across the state throughout the year. Both organizations hold annual conferences, typically in Sacramento, that are attended by many of the state's directors and business managers and superintendents to stay apprised of new and existing laws and regulations regarding school facilities issues.

It is imperative that the district support the director to attain the knowledge and skills necessary to bring the MOTF departments into compliance with all regulatory issues. The district could be held legally and financially responsible for health and safety issues and areas where the department is out of compliance.

## Training and Safety

The district lacks a districtwide training program for maintenance, operations and transportation staff, and is out of compliance in a number of areas related to health and safety. FCMAT found no current written district policies or procedures regarding training, safety issues, or departmental protocols. Sufficiently training employees in the responsibilities of their position ensures they will be successful.

The director of maintenance, operations and transportation should immediately develop a thorough, standardized training program to bring all district procedures, departments, and sites into compliance with federal, state, and local regulations. Consistent, standardized initial and ongoing training for all maintenance and operations staff should be a part of this program. The director should implement a monthly safety meeting for all maintenance, operation and transportation staff to improve communication and education, and to resolve issues as they arise. The director should ensure that all mandated regulatory training is scheduled, takes place and is documented, and should maintain all employee records related to mandated safety and health training. Software programs could be utilized for ease of tracking.

Training should include the following topics:

- Hazard Communication Plan
- Asbestos
- Lead
- Antimicrobials
- Blood-borne pathogens
- Materials Safety Data Sheets
- Illness and Injury Prevention Program
- Fire extinguisher
- Integrated pest management

- Forklift training/scissor-lift training (if applicable)
- Respiratory protection
- Hand and power tool safety
- Ladder safety
- Back safety
- Electrical safety
- Driver safety

## **Policies and Procedures Manual**

The MOTF department does not have a policies and procedures manual. A manual should be developed to provide employees with consistent and clear policies to follow. The manual should outline legal and procedural mandates to keep the department in compliance and functioning optimally.

The manual should include but is not limited to the following topics:

- Use of District Vehicles
- Use of District Tools and Equipment
- Safety Training
- Key Control
- New Employee Orientation
- Employee Conduct
- Employee Discipline
- Employee Evaluation
- Dress Code/Uniforms

The manual should be developed with the assistance of the human resources department and through district procedures for administrative approval. The manual should be reviewed with the CSEA representative for suggestions before being implemented.

## **Electronic Work Order System**

The district uses an electronic work order system (Help Desk). This appears to be a basic work order system that allows any staff member to generate a work request from any location. However, the district has no formal procedure for prioritizing and assigning work requests. In addition, the computer that is used to track and print work requests is shared by several district employees, along with employees of King City Elementary School District that also occupy the facilities. The district is in the process of negotiating an agreement with the elementary district for the use of the shared facilities.

The director of MOTF should research the option of a more formal work order system such as School Dude or Maintenance Tracker. A software program designed for maintenance and operations can track preventative maintenance scheduling, safety meetings, asbestos inspections, etc. Work order systems can be established that route all requests from staff to the building adminis-

trator (principal or CBO) for approval prior to submission to the MOTF director. This reduces unnecessary work requests and duplications, and increases communication between the MOTF department and the administration. Most work order systems allow staff to track the progress on their request, which increases departmental accountability.

Establishing this protocol with the work request process would enhance the ability of the maintenance department to become more efficient and effective in prioritizing and responding to the district's needs.

## Vehicle and Equipment Replacement

The maintenance and operations department is in need of additional vehicles and equipment. The district does not have a replacement program and must depend on aged, worn-out vehicles and equipment. The maintenance employees drive small pickup trucks that are not adequate to carry the necessary tools or supplies to efficiently and effectively respond to the district's maintenance needs.

A formalized replacement program typically includes criteria (mileage, age, condition, etc.) that is used annually to evaluate the vehicles or equipment. Once the identified criteria is met, the vehicle/equipment qualifies for replacement.

## Five-Year Deferred Maintenance Program

The director of MOTF does not believe he is responsible for the development of the district's state-required 5-Year Deferred Maintenance Program. He has not been involved in the development of the plan in the past. The most recently revised Five-Year Plan was submitted to the state in 2004 by the former director.

The Deferred Maintenance Program (DMP) provides state matching funds to assist school districts with expenditures for major repair or replacement for school building components to ensure safety. Typically, this includes roofing, plumbing, heating, air conditioning, electrical systems, wall systems, and floor systems. An annual basic grant is provided to districts for the major repair or replacement work listed on the Five-Year Plan (Form SAB 4020), which is a projection of deferred maintenance work to be performed districtwide over the next five years. An extreme hardship grant is provided in addition to the basic grant if the district has a critical project on its Five-Year Plan that must be completed within one year for health and safety or structural reasons.

The intent of the plan is to forecast deferred maintenance projects in the district over the next five years. It is not intended as an expenditure report, so the reported project costs should be estimates. The district is not required to perform all the work listed on the plan. New or revised plans for the current fiscal year must be submitted to the Office of Public School Construction (OPSC) by the last working day in June for that fiscal year. The Five-Year Plan allows a district to designate an individual approved by the district's Governing Board to act on the district's behalf and to serve as a contact for the OPSC regarding the Deferred Maintenance Program. If Part One of the Five-Year Plan is not completed, the district superintendent must sign the form and serve as OPSC's point of contact.

Beginning with the 2005-06 fiscal year, school districts and county offices of education are required to establish a facilities inspection system (FIS) as a condition of participation in the Deferred Maintenance Program. This is pursuant to Senate Bill 550, which modified Education Code Section 17070.75(e). The requirements of the FIS are not defined in law other than to state

the system should ensure that each school of the district or county office of education is maintained in good repair. The design of the FIS is determined at the local level. The one exception is for school sites identified by the CDE as ranked in deciles 1-3 based on the 2003 Academic Performance Index and that were newly built before January 1, 2000.

Before submitting a new or revised version of the plan, the proposals and plans for expending funds for the deferred maintenance of school district facilities must be discussed in a public hearing at a regularly scheduled school board meeting. The district is asked in the certification section of the form to enter the date this meeting occurred. This requirement must be met each time a revised plan is submitted to the OPSC.

A district may amend its approved Five-Year Plan as needed for the current and future fiscal years. Plan revisions are not required for estimated cost changes or for moving a project already listed on the plan into a different fiscal year. A revised plan should be submitted to the OPSC for any of the following:

- If the plan has expired.
- If deferred maintenance work will be performed that is currently not listed on the plan or at a school not on the plan.
- To remove the project(s) if the exact same work was entirely paid for under the School Facility Program modernization or the Federal Renovation Program.

The fiscal year in which a district revises the plan will become the starting year for the plan and will project four fiscal years out. The OPSC will not accept revisions to the Five-Year Plan for prior fiscal years.

A project on the Five-Year Plan must involve repair and replacement of one of the school facility components stated in law or approved by the State Allocation Board, and must have approached or exceeded its normal life expectancy. It must also be located in a district-owned facility that is used for school purposes.

Facility components with a history of continued repairs that indicate a shortened life expectancy may be included as eligible items.

The director of MOTF should arrange to have assessments completed on building roof systems, paving needs, painting requirements, asbestos removal, HVAC replacement requirements, etc. The director should prioritize projects and develop a 5-Year Plan to correct system deficiencies. This plan can be modified each year as requirements change. The director should be trained on how to submit the plan to the Governing Board and then to the state. The OPSC has a handbook to assist with this, which is available at [http://www.documents.dgs.ca.gov/opsc/Publications/Handbooks/DMP\\_Hdbk.pdf](http://www.documents.dgs.ca.gov/opsc/Publications/Handbooks/DMP_Hdbk.pdf)

## Preventative Maintenance

The district has no formalized or written plan for scheduled preventative maintenance. A preventative maintenance plan should include a database of district buildings and equipment that may require ongoing preventative maintenance and repair. A preventative maintenance plan would typically include purchase prices, anticipated life expectancies, replacement schedules and budgetary information needed to implement the program. With the absence of a scheduled preventative maintenance program, the maintenance and operations department must provide emergency response, leaving little time for scheduled preventative maintenance.

The probable and desired outcomes of a scheduled preventative maintenance program include:

- Increased life of school buildings and district equipment
- Improved operating efficiency of equipment, with fewer breakdowns
- Lower operating costs, resulting in less impact on the general fund
- Improved safety
- Improved customer satisfaction; less school disruption and downtime due to remedial maintenance activities

Scheduled preventative maintenance is an investment that ultimately results in reduced costs.

A scheduled preventative maintenance program includes regular inspection and maintenance efforts performed *before* facilities deteriorate or equipment breaks down, as opposed to a remedial maintenance program in which efforts to restore facilities and equipment occur *after* a breakdown has occurred. Typically, inspections are conducted by the director of MOTF and the site administrator.

Essential elements of an effective preventative maintenance plan include:

- A department policy regarding preventative maintenance that includes funding sources
- A database of all facilities and equipment that require cyclical preventative care and maintenance
- A chart reflecting scheduled preventative maintenance
- A computer database of priorities for preventative maintenance items
- A computer database, organized by site, that reflects the identity of all equipment and buildings, including name, location, description, age, part number or date of purchase, ID number, etc.
- A computer data base that indicates in chronological order when the servicing or replacement of equipment should occur
- A financial plan, funding sources, and budget codes necessary to track expenditures on school preventative maintenance.
- A calendar for projects that may need to be contracted out (this may be tied to the 5-Year Deferred Maintenance Plan)
- A program that will update the district facilities and equipment inventory each year and reflect the changes that have occurred during the current year as a result of the maintenance performed, addition of new equipment or facilities, demolition of facilities, sale of equipment, or any other changes to the status of facilities or equipment
- A long range (five-year) financial plan reflecting the possible impact of the scheduled preventative maintenance program
- A budget for the scheduled maintenance program that is separate from the routine maintenance program

## Procurement of Supplies

The district's maintenance workers spend much of their time obtaining parts and materials for their work projects. The time spent going to sites to determine the problem, getting approval, purchasing materials/parts, and then going back to the site to complete the work is an inefficient use of employee work time. It doesn't appear that the department keeps an inventory of stock materials, and there is also no inventory control of department tools or materials. In addition, maintenance and mechanics sometimes travel to Salinas to obtain parts that could be shipped the same day. Steps need to be taken to make the purchase and procurement of supplies for maintenance workers more efficient. Many school districts use procurement cards for purchases under \$1,000. These cards can have set purchase limits and can be limited to certain vendors and or types of supplies/materials. This helps streamline procurement procedures and eliminate paperwork and approval time. Each purchase can be tied to job/project and reflected on the work order. These purchases and work orders should be reviewed by the department technician and by the director.

## Employee Morale

Interviews with all maintenance and operations staff indicate that employee morale is low. The overwhelming response of staff was that they felt overworked and unappreciated. Most employees felt that they consistently operate in the role of emergency response, with a lack of consistent schedules or direction. The MOTF director should establish an open line of communication between himself and his staff. Monthly staff meetings should be implemented to improve communication and to resolve department issues as they arise. These can be combined with safety training meetings.

## Recommendations

*The district should:*

1. Develop a plan enumerating short and long term goals for the director of MOTF.
2. Hire a consultant to mentor the director.
3. Require the director to attend CASBO and CASH academies and trainings to become familiar with state and federal regulatory requirements.
4. Develop a thorough, standardized training program on safety and procedures that includes monthly safety meetings.
5. Develop and provide initial and ongoing training to staff, tracking attendance at all trainings and meetings for compliance.
6. Develop a departmental manual and hold staff accountable to strictly follow the policies and procedures established therein.
7. Consider purchasing and implementing an electronic work order system that provides scheduling, routing and tracking features.
8. Budget for and implement a vehicle and equipment replacement program.

9. Contract to have deferred maintenance needs assessed, and develop a 5-Year Plan to correct deficiencies.
10. Implement a comprehensive scheduled preventative maintenance program to keep facilities and equipment in an acceptable operating condition.
11. Develop an equipment/materials procurement manual outlining district policies and procedures for equipment and supply purchases.
12. Research and consider implementing a procurement card system for purchases below an established value.
13. Implement monthly staff meetings to discuss issues and review policies and procedures.
14. Consider establishing staff appreciation activities (e.g., potlucks, barbecues) to enhance department morale.



# Appendices

## Appendix A - Study Agreement





**FISCAL CRISIS & MANAGEMENT ASSISTANCE TEAM  
STUDY AGREEMENT  
October 19, 2010**

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

**1. BASIS OF AGREEMENT**

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

In keeping with the provisions of AB1200, the County Superintendent will be notified of this agreement between the District and FCMAT and will receive a copy of the final report. The final report will 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 a review of the custodial department practices and procedures and make recommendations based upon best practices to improve efficiency.
2. Review custodial materials and equipment and make recommendations for improvement if needed.
3. Review custodial, grounds, and maintenance staffing levels and work schedules and make recommendations to improve efficiency.

4. Review bus routes and schedules and make recommendations to improve efficiency.
5. Review staffing levels of transportation department and make recommendations for cost containment.

B. Services and Products to be Provided

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

3. PROJECT PERSONNEL

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

|                                 |  |
|---------------------------------|--|
| <i>A. Mary Barlow</i>           | <i>FCMAT Deputy Administrative Officer</i> |
| <i>B. Thomas (Kirk) Gilbert</i> | <i>FCMAT Consultant</i>                    |
| <i>C. Michael G. Rea</i>        | <i>FCMAT Consultant</i>                    |

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. The District will be invoiced at actual costs, with 50% of the estimated cost due following the completion of the on-site review and the remaining amount due upon acceptance of the final report by the District.

**Based on the elements noted in section 2 A, the total cost of the study is estimated at \$5,000.**

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

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

#### 5. **RESPONSIBILITIES OF THE DISTRICT**

- A. The District will provide office and conference room space while on-site reviews are in progress.
- B. The District will provide the following (if requested):
  - 1) A map of the local area
  - 2) Existing policies, regulations and prior reports addressing the study request
  - 3) Current or proposed organizational charts
  - 4) Current and two (2) prior years' audit reports
  - 5) Any documents requested on a supplemental listing
  - 6) Any documents requested on the supplemental listing should be provided to FCMAT in electronic format when possible.
  - 7) Documents that are only available in hard copy should be scanned by the district and sent to FCMAT in an electronic format.
  - 8) All documents should be provided in advance of field work and any delay in the receipt of the requested documentation may affect the start date of the project.

- C. The District Administration will review a preliminary draft copy of the study. Any comments regarding the accuracy of the data presented in the report or the practicability of the recommendations will be reviewed with the Team prior to completion of the final report.

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

## 6. PROJECT SCHEDULE

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


|   |                                  |
|---|----------------------------------|
| <b><i>Orientation:</i></b>                  | <b><i>November 8-9, 2010</i></b> |
| <b><i>Staff Interviews:</i></b>             | <b><i>to be determined</i></b>   |
| <b><i>Exit Interviews:</i></b>              | <b><i>to be determined</i></b>   |
| <b><i>Preliminary Report Submitted:</i></b> | <b><i>to be determined</i></b>   |
| <b><i>Final Report Submitted:</i></b>       | <b><i>to be determined</i></b>   |
| <b><i>Board Presentation:</i></b>           | <b><i>to be determined</i></b>   |
| <b><i>Follow-Up Support:</i></b>            | <b><i>If requested</i></b>       |

## 7. CONTACT PERSON

Name of contact person: Linda Grundhoffer, Interim CBO

Telephone: (831) 385-0606 x 4339 FAX: (831) 385-0695

E-Mail: [lgrundhoffer@kingcity.k12.ca.us](mailto:lgrundhoffer@kingcity.k12.ca.us)

|   |                  |
|---|------------------|
| _____   | _____            |
| Dr. John Bernard  | Date             |
| King City Joint Union School District   |                  |
|  | October 19, 2010 |
| _____   | _____            |
| Anthony L. Bridges, Deputy Executive Officer  | Date             |
| Fiscal Crisis and Management Assistance Team  |                  |