

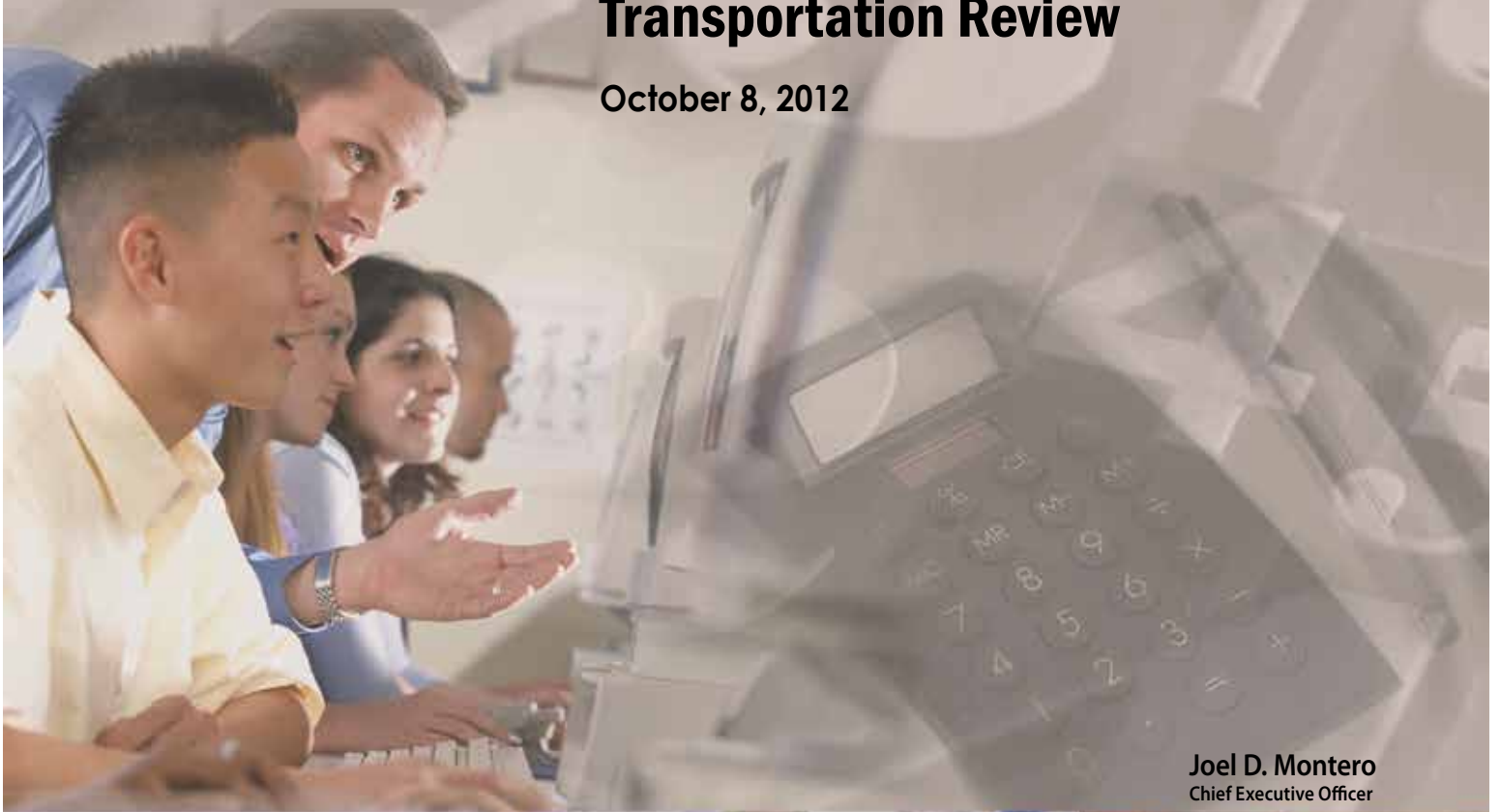


**CSIS** *California School Information Services*

# **Ocean View School District**

## **Transportation Review**

October 8, 2012



**Joel D. Montero**  
Chief Executive Officer







## CSIS California School Information Services

---

October 8, 2012

Kathy Kessler, Interim Superintendent  
Ocean View School District  
17200 Pinehurst Lane  
Huntington Beach, CA 92647

Dear Interim Superintendent Kessler,

In April 2012, the Ocean View School District and the Fiscal Crisis and Management Assistance Team (FCMAT) entered into an agreement for a transportation review. Specifically, the agreement stated that FCMAT would perform the following:

1. Conduct a review of the transportation budget utilizing two years of Audited Financial Statements to provide a comparative cost analysis with the 2011-12 fiscal year budget that will include the following components. The objective is to determine district trends for revenues and expenditures and make recommendations to reduce encroachment, if any, for both home to school and special education transportation.
  - a. Budget planning and development process
  - b. Budget amendment procedures
  - c. Budget assumptions for 2011-12 by Resource
  - d. Budget to Actuals comparison for two historical years
  - e. 2011-12 Operating budget
  - f. Operating Revenues and expenditures as a percent of the total budget
  - g. Operating Revenue
  - h. Revenue line item explanations
  - i. Operating expenditures
  - j. Expenditure line item explanations
  - k. Sources and Uses of Funds

### FCMAT

Joel D. Montero, Chief Executive Officer


1300 17<sup>th</sup> Street - CITY CENTRE, Bakersfield, CA 93301-4533 • Telephone 661-636-4611 • Fax 661-636-4647  
422 Petaluma Blvd North, Suite. C, Petaluma, CA 94952 • Telephone: 707-775-2850 • Fax: 707-775-2854 • [www.fcmat.org](http://www.fcmat.org)  
Administrative Agent: Christine L. Frazier - Office of Kern County Superintendent of Schools

- l. Debt Obligations
  - m. Operating Improvements
  - n. Capital Improvements
  - o. Capital Contingency Fund
  - p. Capital Asset Distribution
  - q. Interagency transfer of funds
2. Provide recommendations for appropriate staffing levels and organizational structure for the transportation department using comparative school districts. Comparisons will be made to six school district departmental operations of similar size and structure regarding productivity and efficiency models and shall include the following components:
- a. Personnel Summary by District position
  - b. Review Job Descriptions of each district position
  - c. Review customer service records or logs
  - d. Review professional development training by position
3. Review specifically the operations of transportation services which shall include the following: Operations, Routing, and Scheduling and make recommendations to improve the operational efficiency for both Home to School and Special Education Transportation.
- a. Review Student Demographic Data
  - b. Evaluate Average Weekly Ridership by Site, Resource & District and provide a forecast summary
  - c. Evaluate the routing methodologies including the use of automated routing software
  - d. Evaluate the number of routes including board policies regarding walking distances
  - e. Review the department's on time performance and efficiency review
  - f. Evaluate the department's vehicle maintenance and inspection reports
  - g. Review the bus loading and student counts for each route
  - h. Evaluate the department's School Bus Inventory, School Bus Replacement Schedule and Equipment availability
  - i. Review Field Trips and Scheduling of buses
  - j. Review the department's customer service or complaint logs

- k. Review the IEP process for student transportation
- l. Review board policies, administrative regulations and past practices regarding voluntary desegregation and open enrollment policies for busing students.

This final report contains the study team's findings and recommendations in the above areas of review. We appreciate the opportunity to serve the Ocean View School District, and extend our thanks to all the staff for their assistance.

Sincerely,

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

Joel Montero

Chief Executive Officer



# Table of contents

About FCMAT .....	iii
Introduction .....	1
Background.....	1
Study Guidelines .....	3
Study Team.....	4
Executive Summary.....	5
Findings and Recommendations.....	7
Organizational Structure and Staffing .....	7
Transportation Finance .....	11
Routing and Scheduling .....	13
Vehicle Maintenance, Replacement and Fueling .....	21
Appendices.....	23





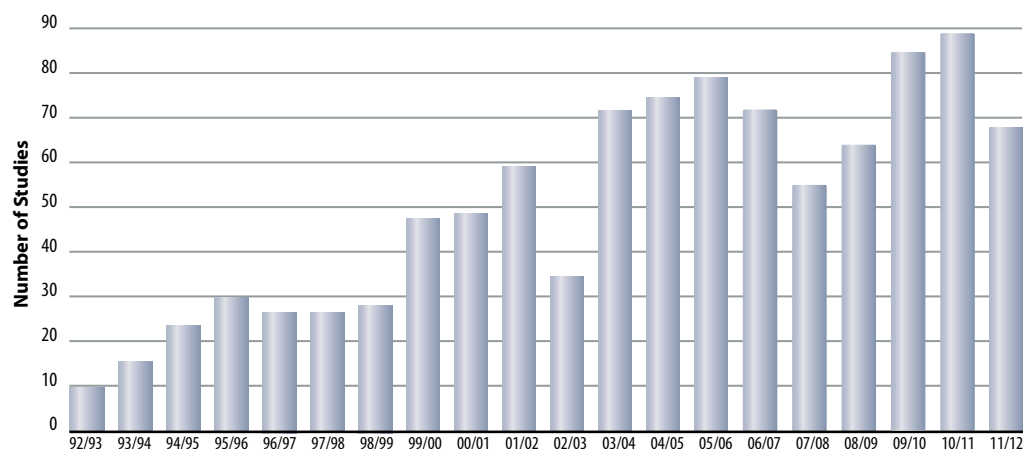
# About FCMAT

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

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

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

**Studies by Fiscal Year**



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

AB 1200 is also a statewide plan for county 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 Ocean View School District is located near the Pacific Ocean in Orange County and has an enrollment of approximately 9,500 K-8 students. The district operates 13 home-to-school and 13 special education routes transporting approximately 1,800 students each day. School buses cover 1,250 miles per school day in a 15-square-mile area, with most of the schools in Huntington Beach and one school each in Fountain Valley and Westminster.

The district has 12 elementary (K-5) schools, four middle schools and two preschools. The district provides transportation services for the following schools:

- Circle View Elementary
- College View Elementary
- Golden View Elementary
- Harbour View Elementary
- Hope View Elementary
- Lake View Elementary
- Marine View Middle School
- Mesa View Middle School
- Spring View Middle School
- Star View Elementary
- Sun View Elementary
- Village View Elementary
- Vista View Middle School
- Westmont Elementary

Following a district transportation report published February 21, 2012, the district requested the Fiscal Crisis and Management Assistance Team (FCMAT) to study specific aspects of the operations as outlined in the scope and objectives of the study:

1. Conduct a review of the transportation budget utilizing two years of audited financial statements to provide a comparative cost analysis with the 2011-12 fiscal year budget that will include the following components. The objective is to determine district trends for revenues and expenditures and make recommendations to reduce encroachment, if any, for both home to school and special education transportation.
  - a. Budget planning and development process
  - b. Budget amendment procedures

- c. Budget assumptions for 2011-12 by resource
  - d. Budget to actuals comparison for two historical years
  - e. 2011-12 operating budget
  - f. Operating revenues and expenditures as a percent of the total budget
  - g. Operating revenue
  - h. Revenue line item explanations
  - i. Operating expenditures
  - j. Expenditure line item explanations
  - k. Sources and uses of funds
  - l. Debt obligations
  - m. Operating improvements
  - n. Capital improvements
  - o. Capital contingency fund
  - p. Capital asset distribution
  - q. Interagency transfer of funds
2. Provide recommendations for appropriate staffing levels and the organizational structure for the transportation department using comparative school districts. Comparisons will be made to six school district departmental operations of similar size and structure regarding productivity and efficiency models and shall include the following components:
- a. Personnel summary by district position
  - b. Review job descriptions of each district position
  - c. Review customer service records or logs
  - d. Review professional development training by position
3. Review specifically the transportation services department and include the following: operations, routing, and scheduling and make recommendations to improve the operational efficiency for both home-to-school and special education transportation.
- a. Review student demographic data
  - b. Evaluate average weekly ridership by site, resource and district and provide a forecast summary

- c. Evaluate the routing methodologies including the use of automated routing software
- d. Evaluate the number of routes including board policies regarding walking distances
- e. Review the department's on time performance and efficiency review
- f. Evaluate the department's vehicle maintenance and inspection reports
- g. Review the bus loading and student counts for each route
- h. Evaluate the department's school bus inventory, school bus replacement schedule and equipment availability
- i. Review field trips and scheduling of buses
- j. Review the department's customer service or complaint logs
- k. Review the IEP process for student transportation
- l. Review board policies, administrative regulations and past practices regarding voluntary desegregation and open enrollment policies for busing students.

## Study Guidelines

The Fiscal Crisis and Management Assistance Team (FCMAT) visited the district from May 9-11, 2012 to conduct interviews with staff, collect data, review documents and inspect facilities. This report is the result of those activities and is divided into the following sections:

- Organizational Structure and Staffing
- Transportation Finance
- Routing and Scheduling
- Vehicle Maintenance, Replacement and Fueling

## Study Team

The study team was composed of the following members:

Debi Deal, CFE

FCMAT Fiscal Intervention Specialist

Los Angeles, California

Larry Laxson

FCMAT Consultant

El Cajon, California

Laura Haywood

FCMAT Technical Writer

Bakersfield, California

Tim Purvis\*

Director of Transportation

Poway Unified School District

Poway, California

Jim Foley\*

Assistant Superintendent of Business

Kerman Unified School District

Kerman, California

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

# Executive Summary

Ocean View School District operates 26 bus routes for home-to-school and special education that serve approximately 20% of its students. Over time the district has made adjustments for efficiency that include route consolidation, increasing the kindergarten program to all day, locating the preschool on one site, and splitting bell schedules at the middle school campuses.

The district has maintained a quality transportation program, making adjustments commensurate with a loss in state funding for the four years prior to 2011-12 when drastic cuts in funding caused the encroachment to increase. Additional mid-year state funding cuts were averted through subsequent legislation in the 2011-12 fiscal year. Current projections remain unchanged from the prior fiscal year, but school transportation funding has been targeted many times by the state in an attempt to balance its budget.

FCMAT prepared a fiscal analysis of revenues, expenditures and program encroachment based on the prior two years' state approved transportation reports and the audited financial records.

Prior to 2009-10, the district applied restricted Targeted Instructional Improvement Block Grant (TIIG) funds to offset a portion of the district's unrestricted general fund contribution. Beginning with the 2009-10 fiscal year, flexibility options were granted by the state for several previously restricted programs, allowing the district to redirect the TIIG funds to the unrestricted general fund instead.

A financial comparison and analysis shows that the district reduced its year-to-year unrestricted general fund contribution for the four-year period of 2007-08 through 2010-11. The largest reduction, \$212,655, occurred between 2009-10 and 2010-11. However, during 2011-12 the encroachment increased by \$138,973.

## Organizational Structure and Staffing

Thirty-five employees, including four substitute drivers, provide transportation service for approximately 1,800 district students each school day. Many of the employees have been with the department for more than a decade, and some have more than 20 years of service with the district.

The organizational structure serves the district well in its design except for the lack of a dedicated driver trainer. Instead, one bus driver is a state certified driver trainer and is authorized extra time each week to provide mandatory training and file documentation.

## Routing and Scheduling

The master schedule has two bell schedules that include school start times that are within 30 minutes of each other. The bell schedules should be staggered and sufficiently tiered to provide enough time for school bus drop-off and return pickup at a separate location. Additionally, afternoon dismissal times that are one hour apart at the elementary school sites cause the bus to provide two separate runs with considerably fewer students than in the morning schedule.

Current home-to-school transportation eligibility zones were created from a district master plan dating back more than two decades. A review of school bus stops plotted on area maps for each of the district's elementary and middle school attendance boundary areas shows that school bus stops often fall within one-half mile of each other and one mile from the school. Many are within a half mile of the school.

Each route has several bus stops, which is generous compared to other suburban school districts with similar geographic grid designs and high-density populations.

The district has no school board policy stating the district's position regarding the level of non-mandated home-to-school general education student transportation support or eligibility. Clearly defined eligibility criteria should be developed for transportation. Currently, only middle school students are identified for transportation eligibility.

## **Driver Training and Transportation Safety Plan**

The district has a school bus driver who is a state certified instructor; however, the primary job is dedicated to a 33 hour per week bus driving contract. To fulfill the required driver trainer instruction and documentation of driver records, the district authorizes between 40-60 hours monthly in addition to the bus driving contract time.

The district should employ a full-time instructor assigned to the primary duties of both original and renewal classroom and behind-the-wheel instruction. A dedicated instructor would perform all necessary in-service training for bus driver certification, driver proficiency ride checks, accident investigation, maintenance and monitoring of district commercial driver records and related record maintenance as stipulated in the California Code of Regulations Title 13. The driver/driver trainer position could be reclassified to driver trainer/relief driver, with the functions split equally.

## **Vehicle Maintenance, Replacement and Fueling**

The district has a modern and well-organized vehicle maintenance garage adjacent to the transportation operations offices that includes five vehicle maintenance bays, an outside steam cleaning bay and a vehicle wash rack. All vehicle records are manually maintained. The district's vehicle files are well-organized, with meticulous documentation of vehicle repairs and preventative maintenance schedules.

The district has not implemented the vehicle maintenance module in the TransTraks electronic software. Implementation would provide accurate and up-to-date tracking of each vehicle, allowing for fleet cost analysis as well as interdepartmental cost tracking of vehicle repairs, labor and fuel for other district fleet vehicles.

The district does not have a gasoline or diesel fueling station. Diesel fuel is provided through an outside vendor. The district could secure more competitive fuel pricing through a cooperative bid with neighboring school districts or municipalities.

## **Collective Bargaining Agreement, Compliance and Review**

The district is committed to making an effort to maintain and support 13 routes (half of the current routes) at a minimum of 30 hours per week under the collective bargaining agreement (CSEA Contract 20.2 Hours, Sections 20.2.4 and 20.2.7). Nine driver contracts are guaranteed 30 hours or more, and the remaining 17 positions are contracted between 20-27 hours each. All driving positions are contracted at either 10 or 11 months per fiscal year. Elementary school districts have a shorter instructional day than high school or unified school districts. Sufficiently tiered master bell schedules would allow better utilization of labor and the school bus fleet.

A financial comparison and analysis shows that the district reduced its year-to-year unrestricted general fund contribution for the four-year period of 2007-08 through 2010-11. The largest reduction, \$212,655, occurred between 2009-10 and 2010-11. However, during 2011-12 the encroachment increased by \$138,973.



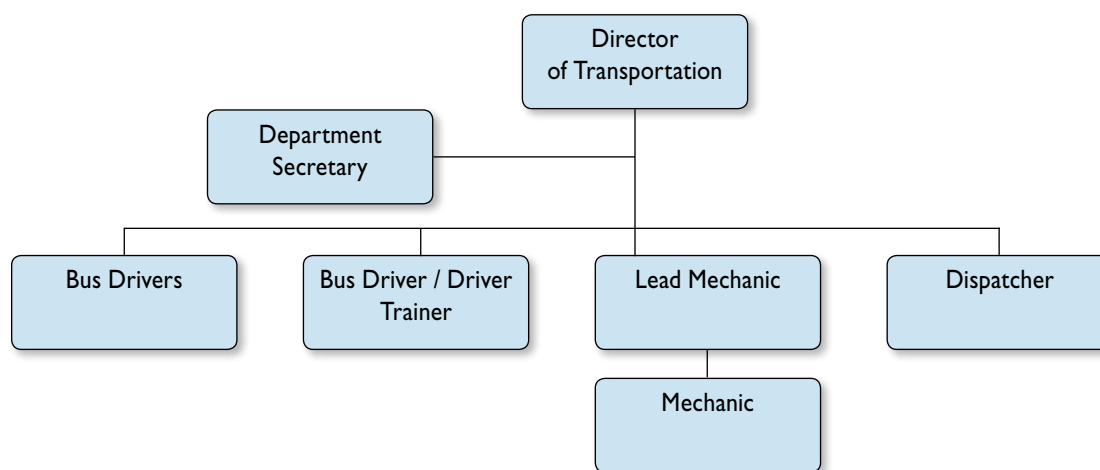
# Findings and Recommendations

## Organizational Structure and Staffing

### Current Organizational Structure

The district's transportation department is overseen by a full-time director. The transportation operations staff consists of one 10-month per fiscal year department secretary and one 12-month full-time dispatcher.

The district employs 26 permanent school bus drivers to operate 26 daily school bus routes. The daily routes consist of 13 routes to transport approximately 220 special education students and 13 routes to transport approximately 1,560 home-to-school students. Of the 1,560 home-to-school students, 600 attend district middle schools. The following chart depicts the current department structure:



### Director of Transportation

The director of transportation functions as an administrative-level manager with primary responsibility for the district's transportation functions, including home-to-school and special education school bus routing, safety and training, budget oversight, parent communications and vehicle maintenance.

### Department Secretary

The department's administrative secretary works eight hours daily on a 10-month contract. The director of transportation prepares the actual routing schedule for the secretary. The administrative secretary transfers the routing schedules into Microsoft Word for regular home-to-school transportation, while the director prepares the routing schedules for special education students. Other responsibilities include:

- Preparing manual invoices generated by the vehicle maintenance staff
- Monitoring budget codes and expenditures
- Processing driver time records for the payroll department
- Preparing monthly field trip billing report for the business office

## Dispatcher

The dispatcher works full-time, 12 months. The dispatcher's primary responsibility is daily scheduling of all regular school bus routes and extra trips. The dispatcher assigns substitute drivers as necessary and fills in as a substitute bus driver three to four times weekly as needed.

## Bus Drivers

The district employs 26 permanent bus drivers to operate 13 home-to-school routes, 13 special education school bus routes and field trips. In addition, the district employs four substitute school bus drivers.

## Bus Driver/Driver Trainer

The district does not have an employee that is fully dedicated to state certified school bus instructor duties. One of the district's school bus drivers is also a state certified school bus instructor who performs the necessary duties of behind-the-wheel instruction, classroom instruction and record maintenance in addition to driving a contracted route.

The state certified school bus instructor is assigned to a school bus route 33 hours per week and is authorized additional time each week to perform the driver training functions. District payroll records show that this employee works 40-60 hours each month in extra time and/or overtime to complete the license renewal classroom instruction, in-service training for school bus certificate maintenance, driver proficiency ride checks and required documentation of driver training. CDE Transportation Instructor Bulletin #03-14 authorizes school districts to allow behind-the-wheel training by a "delegated behind-the-wheel trainer who has been certified or approved by the department to conduct the required training." A delegated behind-the-wheel trainer may assist a state-certified instructor in training drivers.

The district meets the California Department of Education pupil transportation program suggested minimum number of 25 permanent bus drivers to warrant a full-time state certified school bus instructor. A dedicated instructor would be assigned the primary duties of both original and renewal classroom and behind-the-wheel instruction. In addition, a dedicated instructor would perform these duties:

1. In-service training for driver school bus certification maintenance.
2. Driver proficiency ride check.
3. Accident investigation.
4. Maintenance and monitoring of commercial driver records from the Department of Motor Vehicles (DMV) Employer Pull Notice program and related record maintenance per California Code of Regulations Title 13.
5. Fill in as a back-up driver as necessary during leaves of absence.

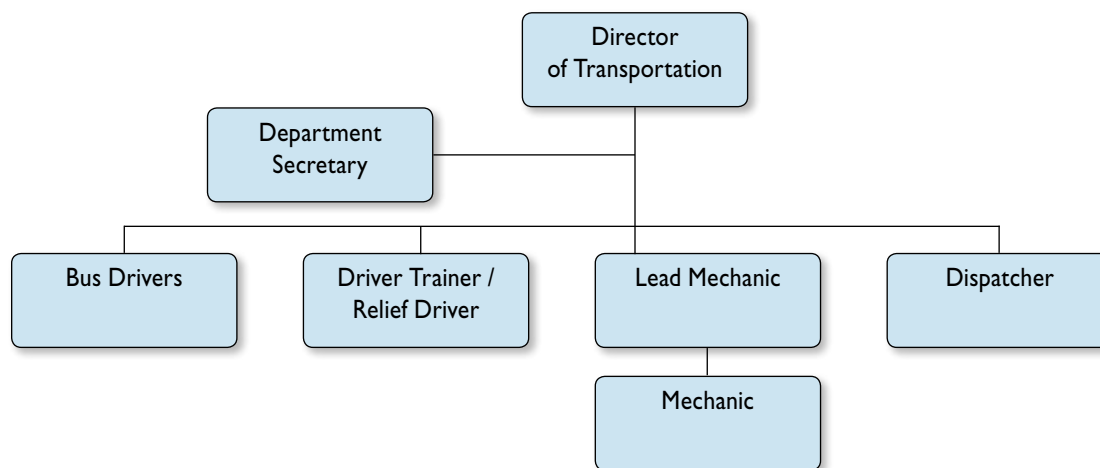
Education Code (EC) 40085 requires that to renew a school bus driver's certificate in accordance with Section 545 of the Vehicle Code, the driver must complete 10 hours of behind-the-wheel or in-service training during each 12 months of certificate validity. The 10-hour classroom instruction consists of current laws and regulations, defensive driving, accident prevention, emergency procedures, and passenger loading and unloading. Failure to complete the required training during any 12-month period is cause for the DMV to cancel the bus driver certificate.

## Mechanics

The transportation department employs one lead mechanic and two additional mechanics to service the bus fleet and other district vehicles. The lead mechanic establishes the work flow and priorities of the shop each day and generates work orders for repairs and bill processing. The district's fleet consists of 38 school buses, 32 support vehicles and six pieces of grounds equipment of varying types as stated on district documentation. The transportation department maintenance staff is responsible for all district vehicles and grounds equipment maintenance.

Because the transportation director and the lead mechanic are married, all mechanic personnel are supervised by the maintenance and operations manager. This arrangement, although unusual, does not impede transportation department operations.

## Proposed Organizational Structure



Based on the size of the district's transportation service, routing, staffing and vehicle maintenance program, the organizational support positions are adequate except for the driver training function.

The district is committed to making an effort to maintain and support 13 routes (half of the current routes) at a minimum of 30 hours under the current California School Employees Association (CSEA) contract. Nine driver contracts are guaranteed 30 hours per week or more, and the remaining 17 positions are contracted between 20-27 hours each. All driving positions are contracted at either 10 or 11 months per fiscal year.

The CSEA collective bargaining agreement is costly for an elementary school district. Elementary school districts normally have a shorter instructional day than high school or unified school districts. Sufficiently tiered master bell schedules would allow better utilization of the drivers and the school bus fleet.

The district should renegotiate a reduction in the number of 30 hour routes if it changes the bell schedules and reduces routes. The cost savings estimates are discussed in depth later in this report.

## Recommendations

*The district should:*

1. Evaluate the benefits of increasing the bell schedule intervals and renegotiate a reduction in the number of 30-hour routes should the district change the bell schedules and reduce routes.
2. Reclassify the driver/driver trainer position to driver trainer/relief driver and split the functions equally.

## Transportation Finance

Prior to 2009-10, the district applied restricted Targeted Instructional Improvement Block Grant (TIIG) funds to offset a portion of the district's unrestricted general fund contribution to transportation. Beginning with the 2009-10 fiscal year, districts were granted flexibility options with several previously restricted programs, allowing the district to redirect the TIIG funds to the unrestricted general fund instead.

The table below shows that the district has reduced its year-to-year unrestricted general fund contribution to transportation over the four-year period of 2007-08 through 2010-11. The largest reduction, \$212,655, occurred between 2009-10 and 2010-11. However, during 2011-12 the encroachment increased by \$138,973.

### *Unrestricted General Fund Contribution to Transportation Program Fiscal Years 2007-08 through 2010-11*

Fiscal Year	Unrestricted General Fund Contribution	TIIG Funding	Total
2011-2012	\$1,144,214	\$0*	\$1,144,214
2010-2011	\$1,005,241	\$0*	\$1,005,241
2009-2010	1,217,896	\$0*	1,217,896
2008-2009	715,378	518,717	1,234,095
2007-2008	994,139 **	437,162	1,431,301

\*Targeted Instructional Improvement Block Grant funding redirected to unrestricted general fund.

\*\* \$271,813 for purchase of special education buses.

The next table illustrates the reduction in expenditures against relatively flat funding for 2009-10 and 2010-11. Essentially, the district spends more than two times the amount of state funding it receives for transportation.

### *Financial Comparison, Fiscal Years 2009-10 and 2010-11*

	2009-10	2010-11
Revenues	\$853,579	\$855,779
Expenditures	\$2,071,475	\$1,861,020
Encroachment	\$1,217,896	\$1,005,241
Percentage of Expenditures to Revenues	243%	217%

The district is required to report annual transportation cost information to the state using the Standardized Account Code Structure (SACS) software. SACS provides several financial reports including a transportation report (Form TRAN). The TRAN report is generated automatically using the district's financial data and its unique information about number of routes, students, buses and total mileage for each program. The table below shows data from the district's financial system for home-to-school and severely disabled/orthopedically impaired (SD/OI) student transportation for fiscal years 2009-10 and 2010-11:

***TRAN Actual Data – Home-to-School and SD/OI  
2009-10 through 2010-11***

<b>TRAN Actual Data Reported</b>	<b>2009-10 HTS</b>	<b>2010-11 HTS</b>	<b>2009-10 SD/OI</b>	<b>2010-11 SD/OI</b>
Number of Routes	23	23	5	5
Number of Students	1,566	1,645	43	45
Number of Miles	181,572	173,310	50,022	45,350
Cost Per Mile	\$8.72	\$8.02	\$8.64	\$9.22
Cost Per Student	\$1,010.91	\$845.38	\$10,047.82	\$9,288.62

The TRAN report for home-to-school and SD/OI shows the same number of routes from one year to the next, with an increase in ridership and a decrease in total miles. Notably, the cost per mile and the cost per student for home-to-school have decreased. However, the cost per mile has increased while the cost per student has decreased for SD/OI.

The financial information shows that the district is working diligently to reduce expenditures and run the transportation department as efficiently as possible; however, there is still opportunity to achieve further savings by implementing several recommendations included throughout this report.

## Recommendations

*The district should:*

1. Continue monitoring transportation costs and implementing the recommendations contained in this report to reduce the encroachment to the unrestricted general fund.

## Routing and Scheduling

Prior to 1977, the state of California fully funded school transportation. During a five-year period from 1977 to 1982 the state slowly reduced funding, and in 1983 the funding level was capped at 80% for each school district based on the reported costs from the prior year. In each subsequent school year, the funding for schools has declined substantially. A cost of living adjustment (COLA) has occasionally been granted to support this program, which is now funded at approximately 35% statewide.

Beginning with the 2009-10 school year, the state further reduced the apportionment by applying a 19.84% deficit factor. Funding was targeted for a 50% reduction in 2011-12 but was ultimately restored to 100% of the previous year's funding. However, new legislation applied a funding cut of \$85 per average daily attendance (ADA) to all school district revenue limit funds instead. Fiscal year 2012-13 proposes to continue funding transportation at the prior year level.

The California Department of Education (CDE) does not mandate general education home-to-school transportation. A 1992 California Supreme Court decision (Arcadia Unified School District v. State Department of Education) determined that charging students for home-to-school transportation does not violate the free school guarantee because transportation is not an educational activity (2 Cal.4<sup>th</sup> 256). However, Education Code Section 39807.5(c) states that "A charge under this section may not be made for the transportation of individuals with exceptional needs as defined in Section 56026."

In addition, the CDE does not mandate a requirement for student walking hazards such as traffic volumes, street crossings or open pathways. However, EC 39831.3 requires a school district that provides home-to-school transportation to also adopt a transportation safety plan. The safety plan must be posted at each school site for California Highway Patrol (CHP) inspection upon request, with periodic updating for any changes including emergency telephone numbers and contact information. Newly enrolled students who will require transportation services must also receive this safety information.

## Bell Schedules

The district provides a high level of home-to-school transportation for its general education students at each school site. The district altered bell schedules in the 2007-08 school year to a two-tiered schedule at the middle schools, saving approximately \$1,000, according to the transportation director.

All sites begin within 30 minutes of one another, which does not allow efficient utilization of bus drivers or the bus fleet. According to staff interviews and observations of student routes and load counts, buses run at approximately a 50% capacity load ratio or less, with several units observed having approximately 15 to 30 passengers. Efficient routing and scheduling can be assessed by determining the average number of students riding each bus route. Maximum capacity for a transit-design bus is approximately 84 passengers, and for a conventional-design bus it is 72 passengers. Maximum capacity is based on three passengers per seat; therefore, a bus used for home-to-school transportation service is operating optimally if the passenger load is between 60 and 75 students of elementary school age. Transportation staff cannot maximize bus loading because of insufficient travel and load times between the district's two standard start times. As a result, the district uses more buses than necessary.

Grades K-3 and grades 4-5 have separate dismissal times at the same school site, requiring dual runs to transport limited grade levels. The following chart shows the current bell schedules:

No. of Schools	K-5 Start Time	K-3 Dismissal Time	4-5 Dismissal Time	6-8 Start Time	6-8 Dismissal Time
7	8:00AM	1:50PM	2:50PM		
4	8:30AM	2:20PM	3:20PM		
2				7:45AM	2:10PM
2				8:15AM	2:40PM

Separating school starting and ending times by at least 35 to 40 minutes would allow greater routing efficiency. Additionally, organizing grades K-3 and grades 4-5 for the same dismissal time or holding one group until the other is dismissed would allow increased transportation efficiency and require fewer buses. Bus routes would allow more time to pick up and drop off students.

A greater separation in tiered start times along with a third tier of start times would allow the district's bus fleet to operate more efficiently. An efficient transportation program attempts to utilize the fewest number of buses for the greatest amount of service time. For a district with 15 school sites that receive some level of home-to-school and/or special education transportation, a two-tiered master bell schedule with a minimum of 45 minutes, or possibly a three-tiered master bell schedule with a minimum of 40 minutes between each tier of schools would significantly reduce the total number of home-to-school bus routes required based on the number of students the district transports.

A three-tiered staggered district master bell schedule would allow a single bus route to service two to three schools in the morning and again in the afternoon. The district benefits by a relatively small geographic footprint in which to accomplish bus routing with this model. Altering the bell schedule start and end times as shown in the chart below potentially could allow the reduction of five to six home-to-school bus routes based on the district's current ridership levels. However, this example does not take into account other potential service level reductions that could be realized by establishing non-eligible and eligible transportation zones around each of the district's 15 school sites that receive transportation.

Based on the average cost of \$55,000 per bus route for salaries and benefits, the district could potentially reduce transportation costs between \$275,000 and \$330,000. The following chart provides one of several examples of a staggered three-tiered master bell schedule that allows for a substantial reduction in buses to provide non-mandated home-to-school transportation at the district's current service levels. Note that specific schools identified in each tiered time frame may not be the best school sites for that particular time frame based on geographic location. The chart is strictly an example to demonstrate the equal distribution of district schools. If the district considers a staggered two- or three-tiered master bell schedule, it should conduct a thorough analysis to determine where schools should be placed in the schedule based on their location.



Tier I					Buses Used	
School	Start Time	Middle School Dismissal	K-3 Dismissal	4-5 Dismissal	AM	PM
Circle View	8:00 a.m.		1:50 p.m.	2:50 p.m.	1	1
Marine View	7:45 a.m.	2:10 p.m.			2	2
Vista View	7:45 a.m.	2:10 p.m.			2	2
Mesa View	7:45 a.m.	2:10 p.m.			1	1
Spring View	7:45 a.m.	2:10 p.m.			2	2
Tier II					Buses Used	
School	Start Time		K-3 Dismissal	4-5 Dismissal	AM	PM
College View	8:30 a.m.		2:20 p.m.	3:20 p.m.	1	1
Golden View	8:30 a.m.		2:20 p.m.	3:20 p.m.	1	1
Harbour View	8:30 a.m.		2:20 p.m.	3:20 p.m.	1	1
Hope View	8:30 a.m.		2:20 p.m.	3:20 p.m.	2	2
Lake View	8:30 a.m.		2:20 p.m.	3:20 p.m.	1	1
Tier III					Buses Used	
School	Start Time		K-3 Dismissal	4-5 Dismissal	AM	PM
Oak View	9:00 a.m.		2:50 p.m.	3:50 p.m.	1	1
Star View	9:00 a.m.		2:50 p.m.	3:50 p.m.	1	1
Sun View	9:00 a.m.		2:50 p.m.	3:50 p.m.	1	1
Village View	9:00 a.m.		2:50 p.m.	3:50 p.m.	1	1
Westmont	9:00 a.m.		2:50 p.m.	3:50 p.m.	1	1

Each route has several bus stops. A random sample of eight elementary school sites showed a total of 12 bus stops within a half mile of the school. A review of all route sheets shows that many buses have between six and 12 school bus stops for each route, which is generous compared to other suburban school districts with similar geographic grid designs and high density populations.

The district should stagger the bell schedules to achieve more efficiency in operations and correlate the dismissal times for K-3 versus 4-5 grades. In addition, the district should limit the number of bus stops per route and consider increased walking distances depending on the number of students on each route and safety factors. This process requires board approval and parent notification. Generally, districts start this process in the spring prior to the next school year. FCMAT has prepared sample maps discussed later in this report.

## After-School Activities

The district provides home-to-school transportation for after-school activities. Six buses are dedicated to after-school activities at the middle school campuses. Two of the district's middle schools have two buses each assigned. The other two middle schools are assigned one bus for their students participating in after-school activities. The additional time is estimated at three hours per school day for all six buses combined.

This level of support is impressive and provides a transportation option for students choosing to stay after school for extracurricular activities. The cost to operate the buses and additional salary and associated benefits is estimated at \$15,390 (\$28.50 x 3 hours x 180 days) per fiscal year. The district could achieve savings by eliminating or reducing this service for the middle schools, but the cost may be minimal compared to the overall benefits provided for student safety.

## Transportation Eligibility Zones

The school board should develop and adopt a policy that states the district's position and level of non-mandated home-to-school general education transportation support to be provided and specifies the criteria for eligibility. District school bus stops should only be positioned well within the transportation eligibility zones for each school boundary. Students should be expected to walk no further to a positioned school bus stop assignment than the distance stated in board policy. Only students who reside within district transportation eligibility areas should be allowed access to a district bus.

Current home-to-school transportation eligibility areas were created from a district master plan dating back more than two decades, with an emphasis on a voluntary desegregation plan arising from a threat of an Office of Civil Rights complaint. As a result, 200-300 students from Oak View Elementary School boundary area are eligible for open enrollment to one of three alternative elementary schools in the district along with home-to-school transportation support.

School bus stops plotted on area maps for each of the district's elementary and middle school attendance boundary areas often fall within a half mile and one mile from the school of residence (see attached school boundary maps). As a result, the district provides a higher level of support than observed in most districts reviewed in suburban areas with sidewalks and traffic control devices.

The district's elementary school students are not issued school bus passes, which increases the number of elementary students riding the bus. Only the middle school students are issued a school bus pass to confirm their eligibility.

## Special Education Transportation and IEPs

Most special needs students do not require specialized transportation services. These students ride with other non-disabled students to the maximum extent possible. However, students with complex and severe disabilities may require transportation service to ensure they receive an appropriate education.

A student that is eligible for services under the Individuals with Disabilities Education Act (IDEA) individualized education plan (IEP) will determine if there is a need for transportation as a related service. It is the responsibility of the IEP team, working with the transportation administrator, to establish the type of specialized transportation service required for each student. This includes the consideration of any specialized care, intervention or training necessary for a medical or health problem.

As previously mentioned, the district operates 13 special education school bus routes that transport approximately 220 special education students, according to transportation staff and records. FCMAT sampled special education transportation request forms and found that the student IEP supported the transportation request. In total, the district provides transportation to 24.4% of its total special education student population of approximately 900. The district expense per student for severely disabled and orthopedically impaired special education transportation is approximately \$9,289, according to the district's 2010-11 transportation report, which is above the statewide average of \$6,268 based upon the most recent state TRAN data for 2008-09.

## Software Utilization and/or Proposed Software

The district has an electronic transportation routing software system called TransTraks. The system is used as a database to track special education students receiving transportation but is not used to develop special education bus routes or to track home-to-school general education students receiving transportation.

Routing software packages are complex and require continued use and professional development training to maximize the use and functionality of the application. On-site training provided by vendor representatives would be very helpful. Transportation staff members are receptive to additional training so they can understand the full capabilities of the software. The district may also take advantage of a collaborative users group because several neighboring districts use TransTraks and can offer support as needed.

The district should fully implement the TransTraks routing component. Full implementation would allow the district to determine transportation eligibility areas; quickly find eligible student addresses; and aid electronically in creating driver directions and most efficient routing paths. Additionally, the system can generate school bus passes based on student eligibility parameters programmed into the software. Student bus passes will permit the district to monitor ridership.

## Maps

The attached maps represent each of the district's sites. The location of the school site is labeled inside each boundary. The team created proposed school maps for each school based on the distance between the student's home and the school of attendance using the following criteria:

- Preschool - 0.5 mile
- Elementary schools – 1 mile
- Middle schools – 1.5 miles

Using the district's student database, the team identified students outside the proposed radius for each type of school to determine the number of students eligible for transportation services. The following table summarizes the number of eligible students for each school site under this scenario:

School	Eligible Ridership
Oak View State Preschool	0
Circle View Elementary	9
College View Elementary	61
Golden View Elementary	37
Harbour View Elementary	80
Hope View Elementary	154
Lake View Elementary	0
Star View Elementary	12
Sun View Elementary	0
Village View Elementary	0
Westmont Elementary	0
Marine View Middle	135
Mesa View Middle	0
Spring View Middle	116
Vista Middle	202
Total Eligible Ridership	806

These proposed eligibility zones do not take into account potential walking hazards or any other agreements the district might have relative to voluntary desegregation.

Current home-to-school ridership is approximately 1,560 students daily. If the district were to adopt the proposed eligibility criteria for home-to-school transportation as listed above, eligibility would decrease by approximately 50% and significant savings would be realized.

Board policy and administrative regulations should clearly identify the distance a student must reside from their home to school of attendance to be eligible for transportation service.

The district could conservatively eliminate four to six general education home-to-school bus routes by implementing the following:

- Identify transportation eligibility and nonservice transportation zones measured by circumference distance circles around each district school.
- Reduce the number of home-to-school bus stops and ensure that bus stops are placed well within the district's identified transportation eligibility zones.
- Expand the district's two-tiered bell schedule up to 45 minutes, or a three-tiered bell schedule up to 40 minutes.
- Eliminate dual dismissal schedules for grades K-3 and 4-5 to allow for a single after-school bus route for all grades at each elementary school site.

Collectively, the recommendations listed above could yield savings between \$220,000 and \$320,000 based on the average cost of \$55,000 per bus route for employee salaries and benefits. This does not include the operational savings for fuel and bus maintenance.

## Recommendations

*The district should:*

1. Establish eligibility criteria and issue passes to students who may access the school buses.
2. Adopt a board policy and administrative regulations that clearly establish home-to-school transportation eligibility and walking distances to school.
3. Review the need for continued voluntary desegregation.
4. Expand the two-tiered master bell schedule up to 40, or a three-tiered master bell schedule up to 45 minutes.
5. Implement TransTraks electronic software to track student eligibility and route scheduling.
6. Obtain on-site training from TransTraks vendor representatives.
7. Ensure that a reasonable number of school bus stops are positioned within the established transportation eligibility zones for home-to-school service.

## Field Trips

The district had 251 field trip requests in the 2011-12 fiscal year that required 420 buses to transport students. Drivers are eligible for trips based on seniority in accordance with the collective bargaining agreement. The transportation department secretary calculates the school transportation billing for field trips. Field trips are charged at a rate of \$1.85 per mile plus a labor rate of \$28.50 for regular time or \$38.50 for overtime.

It cannot be determined if the current mileage rate represents the actual average operational cost per mile because the district does not track cost data for each individual school bus. However, the rate is within normal parameters as compared with other districts' field trip fees. The labor charge adequately reflects the district's actual driver expense. Therefore, the charges appear to be appropriate and reasonable.

## Transportation Safety Plan

The district's board policies posted on the website contain minimal information about student transportation. Additionally, board policy 3542 and related administrative regulations that address student safety are not posted on the district's website. The last updates for the administrative regulations are dated March 14, 2002 and January 22, 1991.

## Recommendations

*The district should:*

1. Post the student safety plan at each school site and ensure that the board policy and related administrative regulations are up to date.



# Vehicle Maintenance, Replacement and Fueling

## Vehicle Maintenance

The district has a modern and well-organized vehicle maintenance garage adjacent to the transportation operations offices. The garage includes five vehicle maintenance bays, an outside steam cleaning bay and a vehicle wash rack. All areas meet Environmental Protection Agency and South Coast Air Quality Management district regulations and standards for vehicle maintenance including storm water runoff and collection. All vehicle maintenance areas are protected for spill runoff by catch basins with water and oil separators. The shop was observed to be clean, well-organized and properly tooled to meet district vehicle maintenance needs.

All vehicle records are manually maintained. A sample review of the district's vehicle files reveals that they are well organized and meticulously document vehicle repairs, preventative maintenance schedules and 45-day/3,000-mile school bus safety inspections.

The district has not implemented the vehicle maintenance module in the TransTraks electronic software. Implementation would provide accurate and up-to-date cost tracking for each vehicle, allowing specific fleet cost analysis and tracking by resource code for special education and home-to-school transportation, as well as interdepartmental cost tracking of vehicle repairs, labor and fuel for other district fleet vehicles.

## Fleet Condition and Replacement Schedule

The district has a total fleet size of 76 vehicles and grounds equipment that includes:

- 38 school buses
- 32 support vehicles for maintenance, operations and food service
- Six pieces of ground equipment.

More than 60% of the district's 38 school buses are model year 1994 or older. Five buses are gasoline powered and the remaining fleet is diesel or compressed natural gas (CNG). All 38 buses are operational, but two have head-gasket leaks, and it may not be cost effective to repair these buses based on model year and condition.

The district has no documented bus replacement plan to address its aging units and prioritize unit replacement. The district should develop a bus and vehicle replacement plan and seek potential grant funding through state and regional programs designed to reduce fuel emissions such as South Coast Air Quality Management District.

## Fuel

The district has no gasoline or diesel fueling infrastructure or storage. Instead, the district receives diesel fuel through an outside vendor who fuels by "wet hosing," a process by which the vendor fuels diesel directly from the supply truck into the buses at the transportation facility. Gasoline vehicles are fueled at a commercial distributor that invoices the district for each vehicle. The district is not being charged federal excise tax by either the commercial gasoline provider or diesel provider; however, the State Board of Equalization requires that the district pay one cent per gallon for state excise tax, which is approximately \$100 per quarter.

## Possible Joint Fuel Agreement

The district should secure more competitive fuel pricing by exploring a cooperative bid with neighboring school districts or municipalities. Large bulk purchases could yield a more favorable pricing structure. Also, it may be advantageous to purchase gasoline and diesel through neighboring districts that have their own fueling storage and infrastructure.

Compressed natural gas that is fueled on site through a slow-fill process does not allow for fuel measurement of individual CNG buses; all vehicles are filled simultaneously with only one measurement of usage. The district should request fueling options from the vendor so it may evaluate individual cost per vehicle.

## Recommendations

*The district should:*

1. Fully implement its vehicle maintenance software to provide accurate individual cost tracking by resource.
2. Create a vehicle replacement schedule to address aging units and prioritize replacement.
3. Seek potential grant funding through state and regional programs designed to reduce fuel emissions.
4. Explore cooperative fuel purchasing with neighboring school districts or municipalities to benefit from increased savings.
5. Request fuel measurement options from the vendor so that the individual cost per vehicle for CNG refueling can be evaluated.



# Appendices

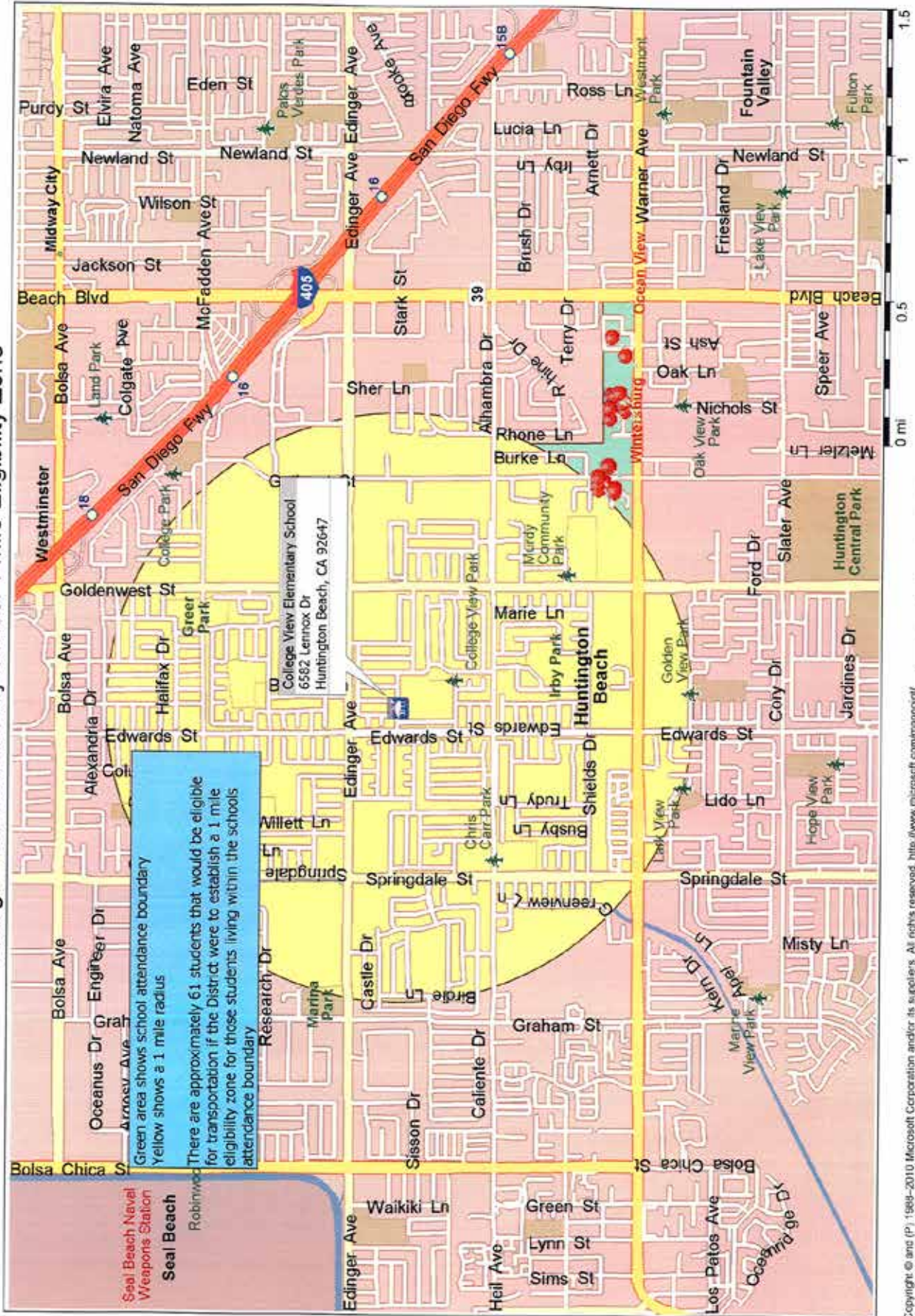
**Appendix A - Eligibility Zone Maps**

**Appendix B - Study Agreement**



## Appendix A

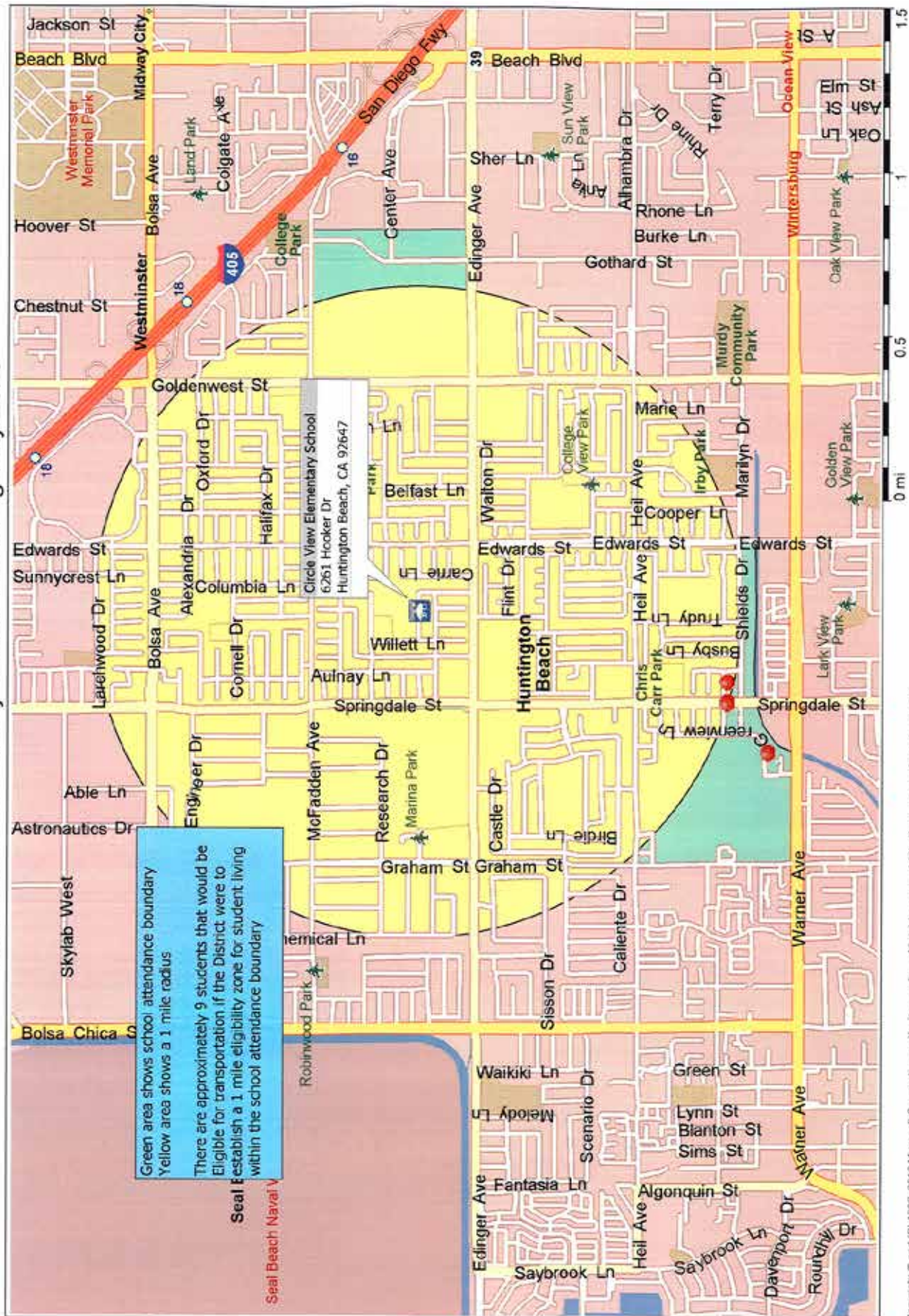
## College View Elementary School 1 Mile Eligibility Zone



Copyright © and (P) 1998–2010 Microsoft Corporation and/or its suppliers. All rights reserved. <http://www.microsoft.com/maps/>  
 Certain mapping and direction data © 2010 NAVTEQ. All rights reserved. The data for areas of Canada includes information taken with permission from Canadian authorities, including: © Her Majesty the Queen in Right of Canada, © Queen's Printer for Ontario, NAVTEQ and NAVTEQ ON BOARD are trademarks of NAVTEQ. © 2010 Tele Atlas North America, Inc. All rights reserved. Tele Atlas and Tele Atlas North America are trademarks of Tele Atlas, Inc. © 2010 by Applied Geographic Systems. All rights reserved.

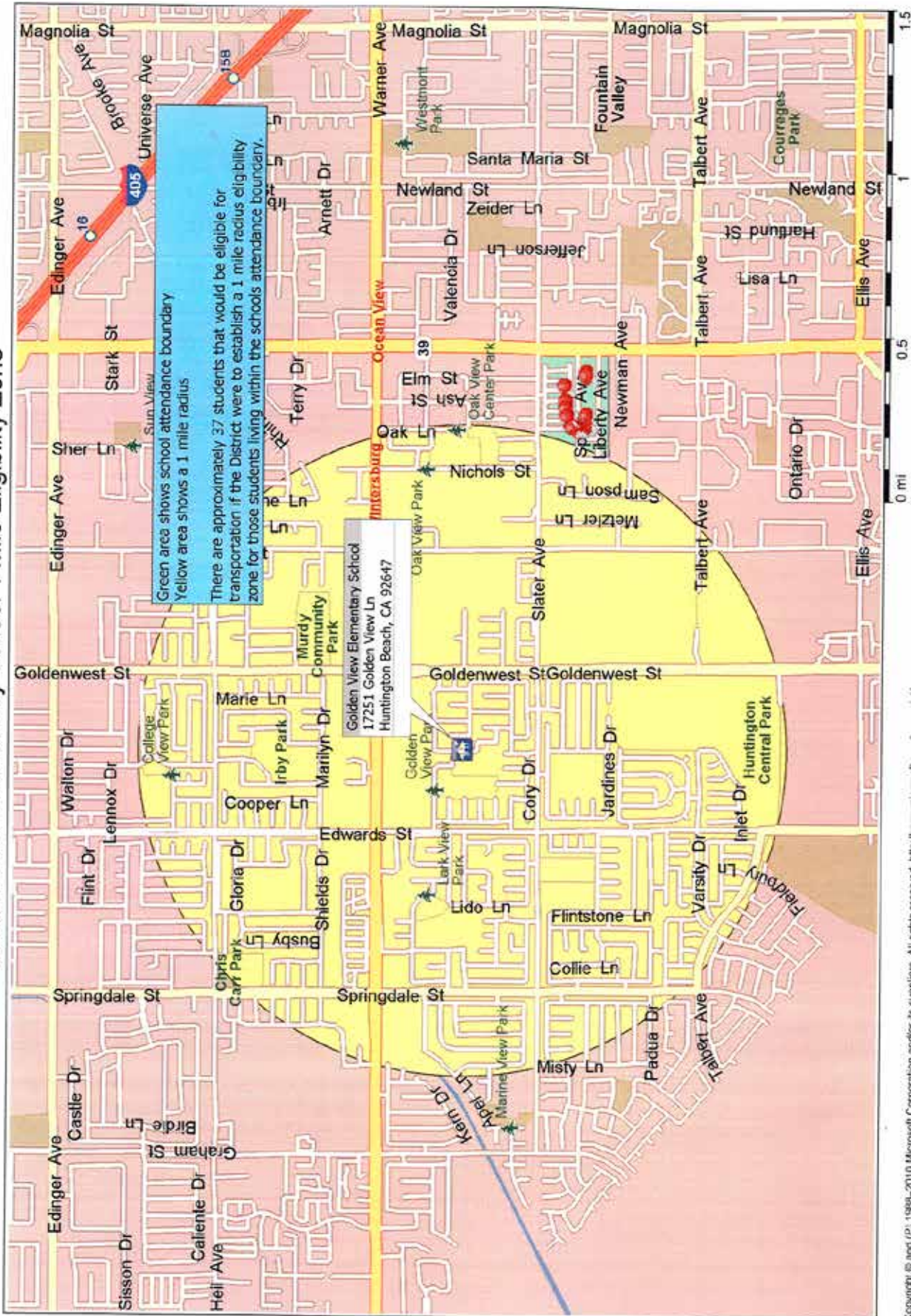


# Circle View Elementary School 1 Mile Eligibility Zone





# Golden View Elementary School 1 Mile Eligibility Zone



Copyright © and (P) 1998-2010 Microsoft Corporation and/or its suppliers. All rights reserved. <http://www.microsoft.com/na/na/na/>  
 Certain mapping and direction data © 2010 NAVTEQ. All rights reserved. The data for areas of Canada includes information taken with permission from Canadian authorities, including © Her Majesty the Queen in Right of Canada, © Queen's Printer for Ontario, NAVTEQ and NAVTEQ ON BOARD are trademarks of NAVTEQ. © 2010 Tele Atlas North America, Inc. All rights reserved. Tele Atlas and Tele Atlas North America are trademarks of Tele Atlas, Inc. © 2010 by Applied Geographic Systems, AI rights reserved.



Map of Huntington Beach, CA, showing school attendance boundaries for Harbour View Elementary School. The map includes the following streets and landmarks:

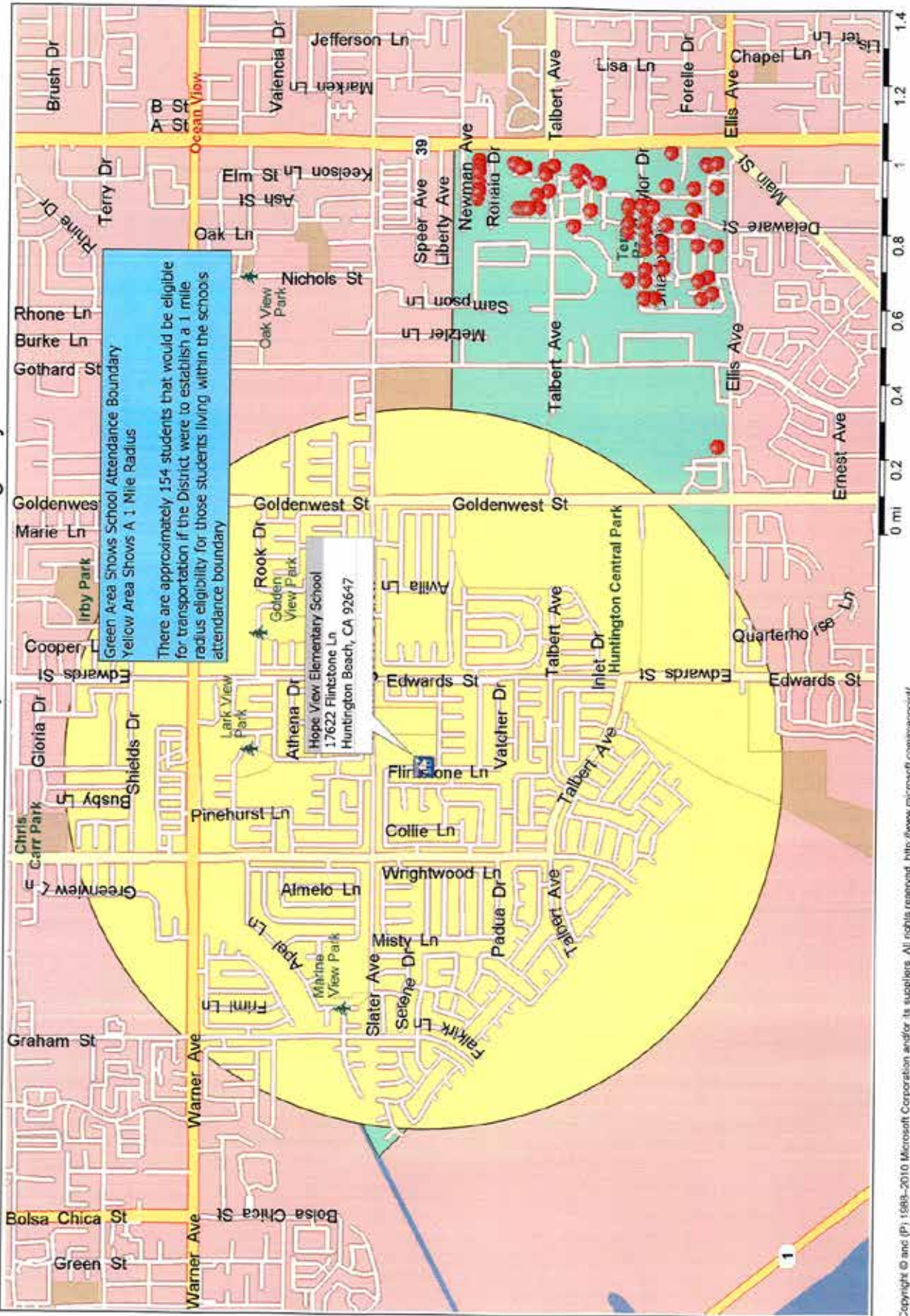
- Streets:** Pacific Ave, Warner Ave, Los Patos Ave, Bright Water Dr, Ocean Ridge Dr, Edinger Ave, Saybrook Ln, Algonquin St, Green St, Lynn St, Sims St, Warner Ave, Los Patos Ave, Bright Water Dr, Ocean Ridge Dr, Edinger Ave, Saybrook Ln, Algonquin St, Green St, Lynn St, Sims St.
- Landmarks:** Seal Beach Naval Weapons Station, Seal Beach, Huntington Beach, Pacific Ocean, San Pedro Bay.
- Scale:** 0 to 1.5 miles.
- Legend:**
  - Green area shows school attendance boundary
  - Yellow area shows a 1 mile radius
- Text Box:**

There are approximately 80 students that would be eligible for transportation if the District were to establish a 1 mile eligibility zone for student living within the school attendance boundary
- Address:** Harbour View Elementary School, 4343 Pickwick Cir, Huntington Beach, CA 92649

Copyright © and (P) 1998–2010 Microsoft Corporation and/or its suppliers. All rights reserved. <http://www.microsoft.com/presspass/>  
Certain mapping and direction data © 2010 NAVTEQ. All rights reserved. The Data for areas of Canada includes information taken with permission from Canadian authorities, including: Her Majesty the Queen in Right of Canada, © Queen's Printer for  
Ontario, NAVTEQ and NAVTEQ ON BOARD are trademarks of NAVTEQ. © 2010 Tele Atlas North America, Inc. All rights reserved. Tele Atlas and Tele Atlas North America are trademarks of Tele Atlas, Inc. © 2010 by Applied Geographic Systems, All  
rights reserved.



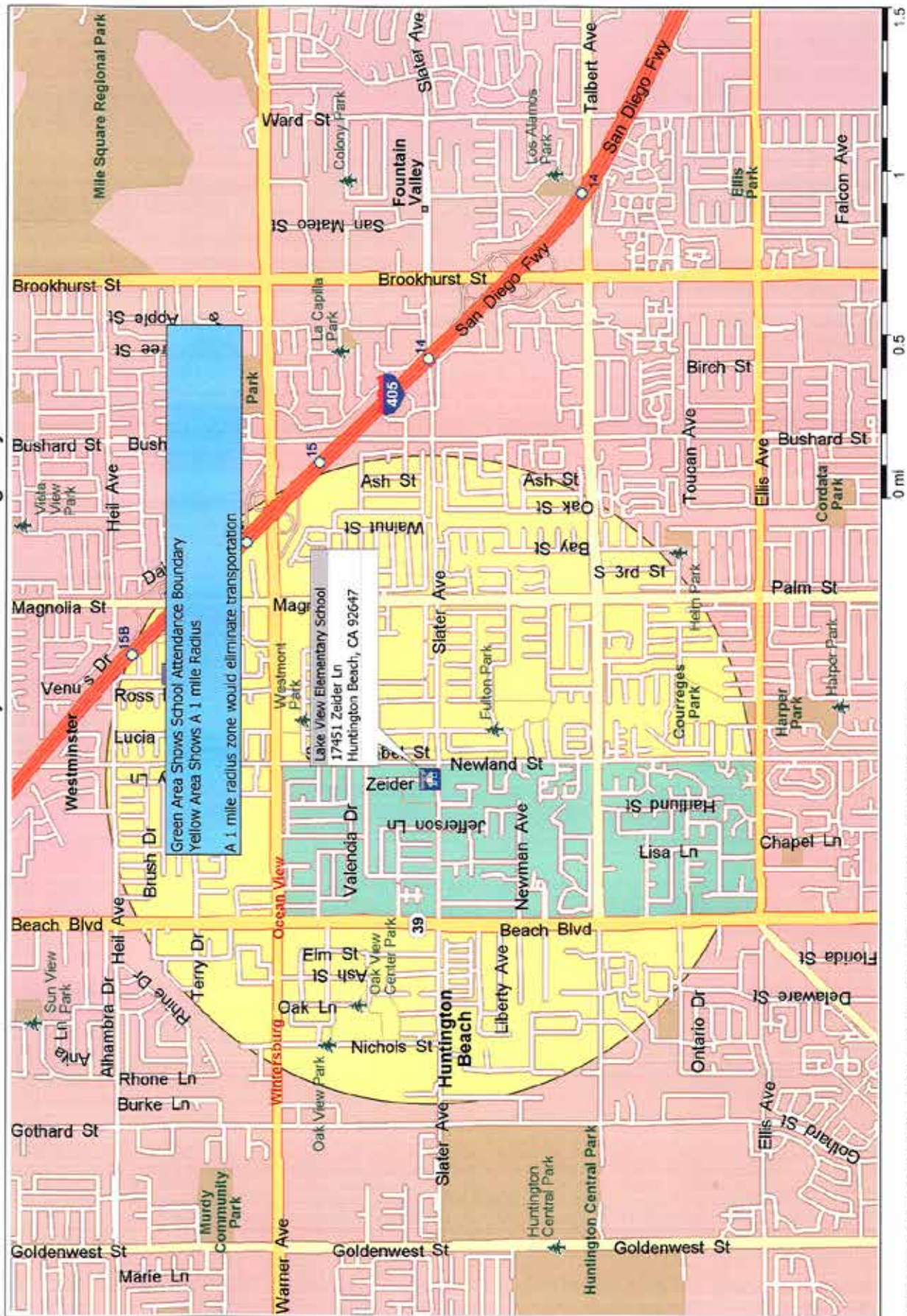
# Hope View Elementary School 1 Mile Eligibility Zone



Copyright © and (P) 1998-2010 Microsoft Corporation and/or its suppliers. All rights reserved. <http://www.microsoft.com/navteq/>  
 Certain mapping and direction data © 2010 NAVTEQ. All rights reserved. The data for areas of Canada includes information taken with permission from Canadian authorities, including: © Her Majesty the Queen in Right of Canada, © Queen's Printer for  
 Ontario, NAVTEQ and NAVTEQ ON BOARD are trademarks of NAVTEQ. © 2010 Tele Atlas North America, Inc. All rights reserved. Tele Atlas and Tele Atlas are trademarks of Tele Atlas, Inc. © 2010 by Applied Geographic Systems, All  
 rights reserved.



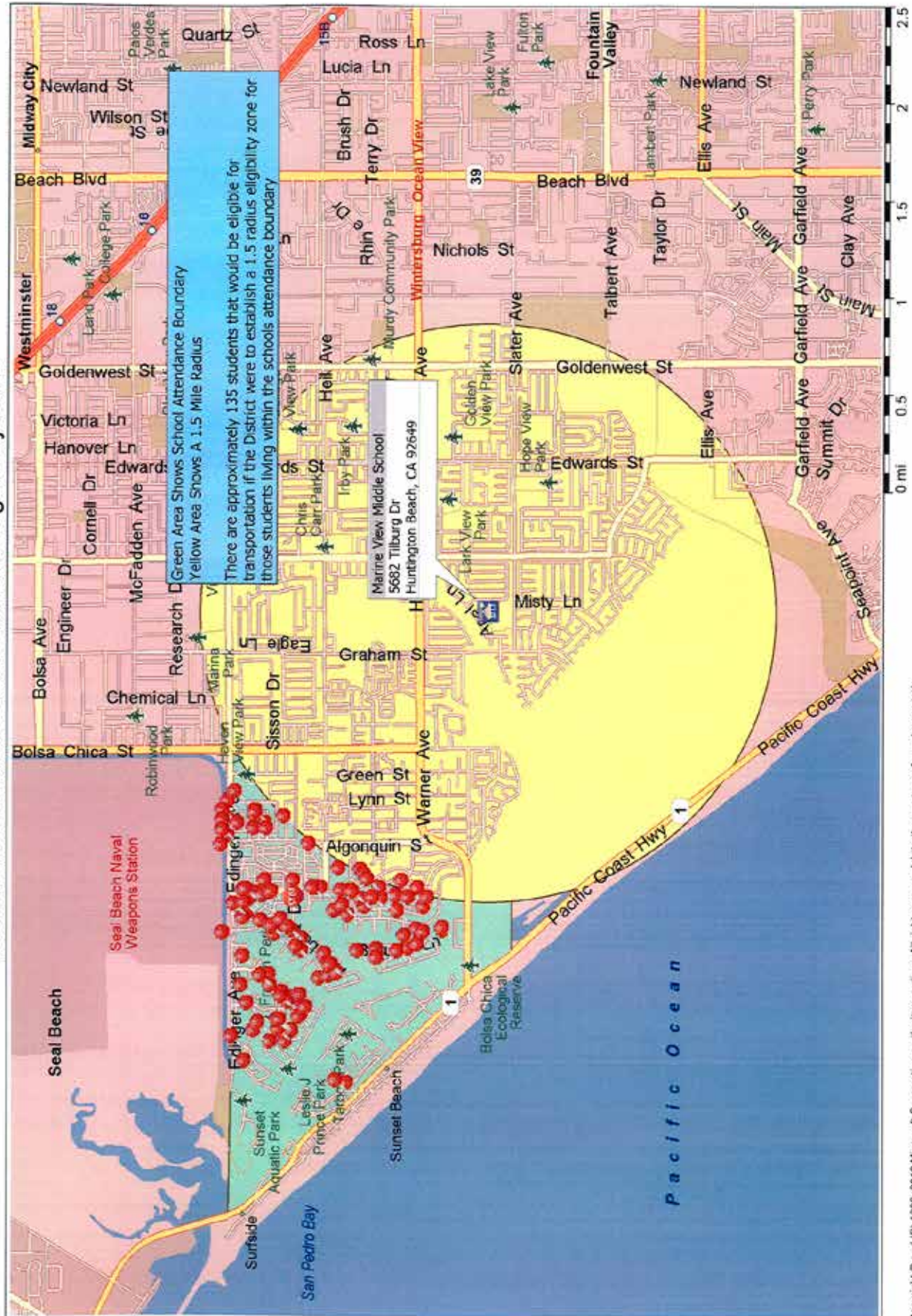
# Lake View Elementary School 1 Mile Eligibility Zone



Copyright © and (P) 1989-2010 Microsoft Corporation and/or its suppliers. All rights reserved. <http://www.microsoft.com/maps/>  
 Certain mapping and direction data © 2010 NAVTEQ. All rights reserved. The data for areas of Canada includes information taken with permission from Canadian authorities, including © Her Majesty the Queen in Right of Canada. © Queen's Printer for  
 Ontario. NAVTEQ and NAVTEQ ON BOARD are trademarks of NAVTEQ. © 2010 Tele Atlas North America, Inc. All rights reserved. Tele Atlas and Tele Atlas North America are trademarks of Tele Atlas, Inc. © 2010 by Applied Geographic Systems. All  
 rights reserved.



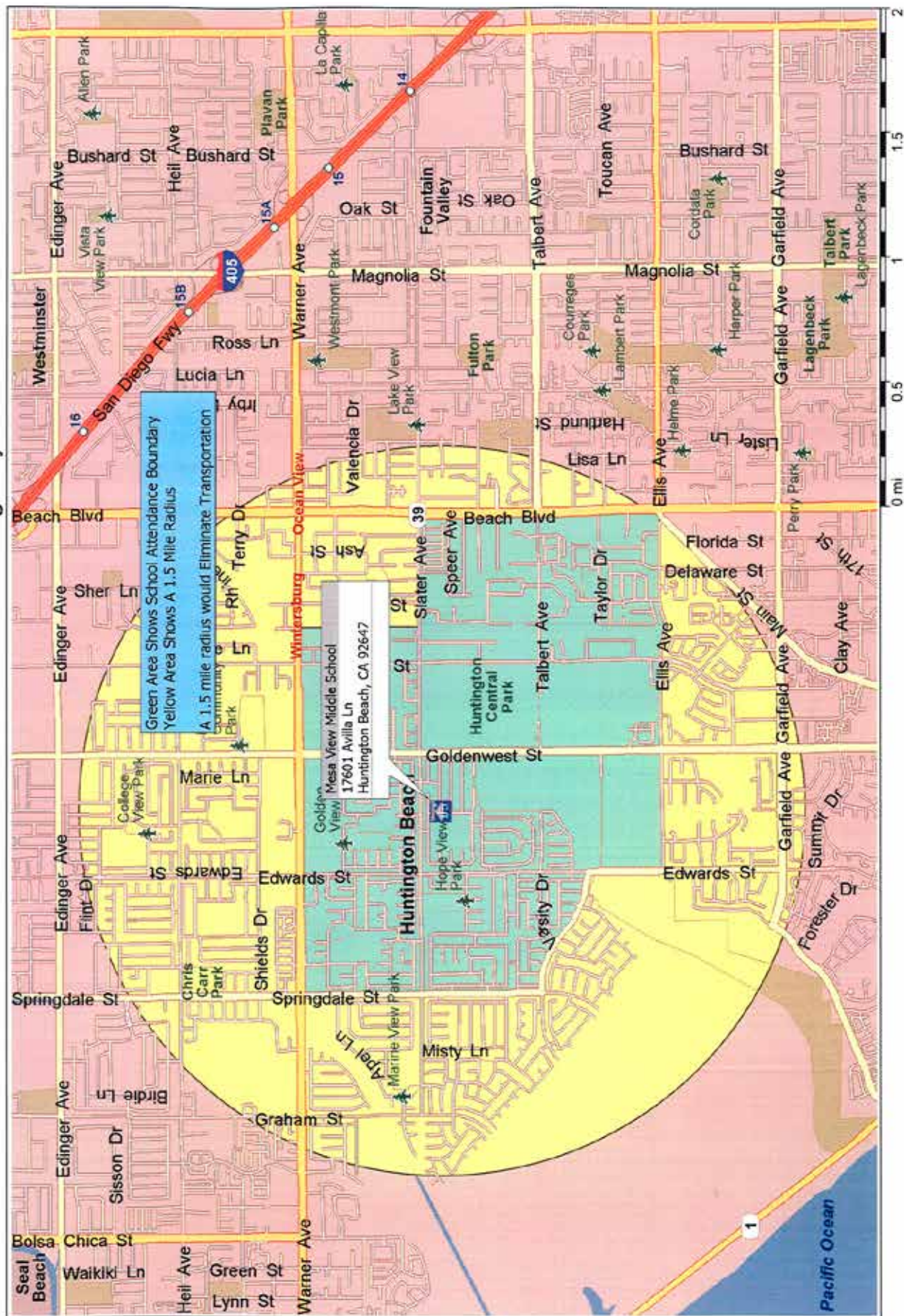
### Marine View Middle School 1.5 Mile Eligibility Zone



Copyright © and (P) 1980-2010 Microsoft Corporation and/or its suppliers. All rights reserved. <http://www.microsoft.com/maps/>  
 Certain mapping and direction data © 2010 NAVTEQ. All rights reserved. The Data for areas of Canada includes information taken with permission from Canadian authorities, including © Her Majesty the Queen in Right of Canada. © Queen's Printer for  
 Ontario. NAVTEQ and NAVTEQ ON BOARD are trademarks of NAVTEQ. © 2010 Tele Atlas North America, Inc. All rights reserved. Tele Atlas and Tele Atlas North America are trademarks of Tele Atlas, Inc. © 2010 by Applied Geographic Systems. All  
 rights reserved.



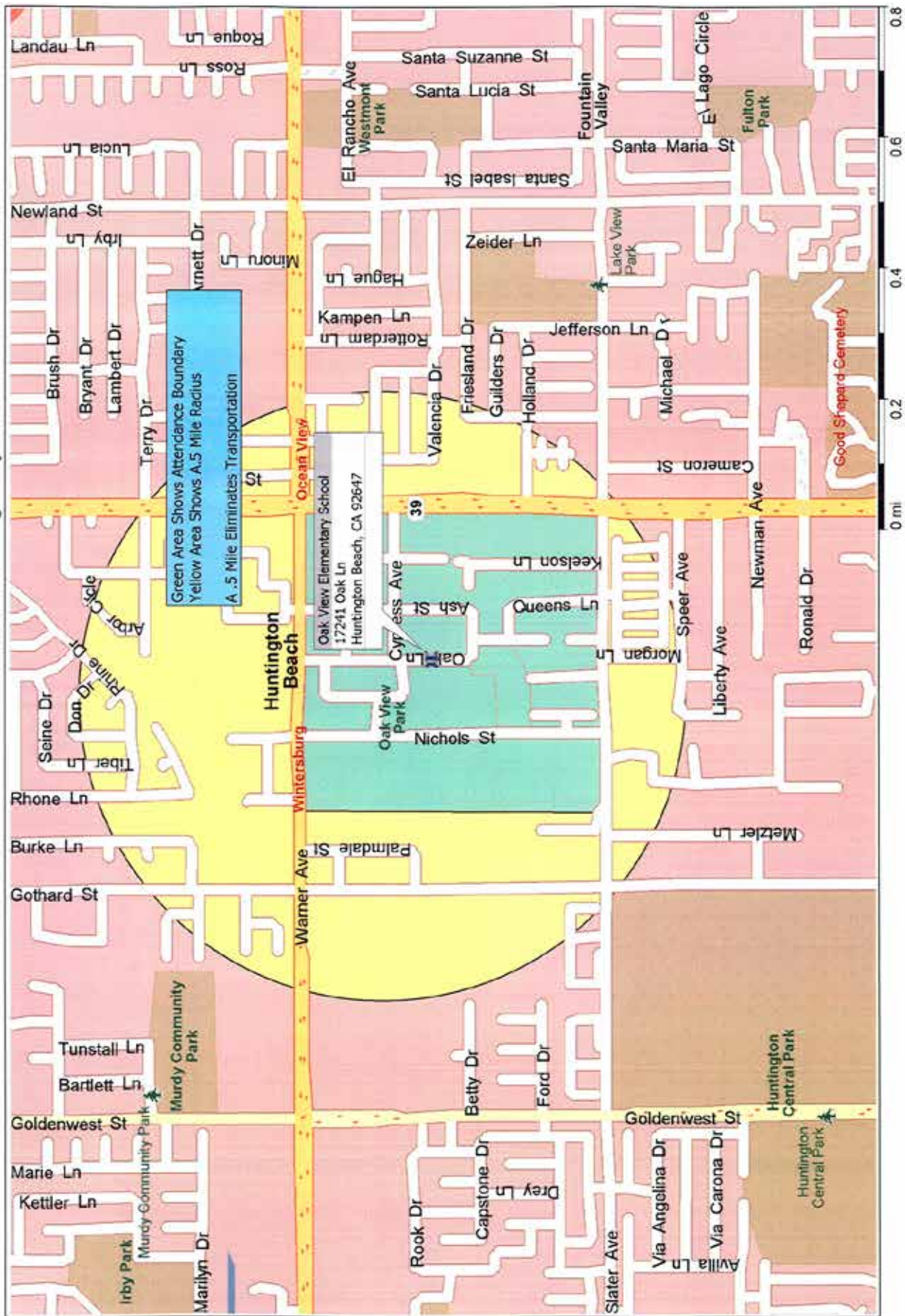
# Mesa View Middle School 1.5 Mile Eligibility Zone



Copyright © and (P) 1988-2010 Microsoft Corporation and/or its suppliers. All rights reserved. <http://www.microsoft.com/maps/>  
 Contains mapping and direction data © 2010 NAVTEQ. All rights reserved. This data for areas of Canada includes information taken with permission from Canadian authorities, including: © Her Majesty the Queen in Right of Canada, © Queen's Printer for  
 Ontario, NAVTEQ and NAVTEQ ON BOARD are trademarks of NAVTEQ © 2010 Tele Atlas North America, Inc. All rights reserved. Tele Atlas and Tele Atlas North America are trademarks of Tele Atlas, Inc. © 2010 by Applied Geographic Systems. All  
 rights reserved.

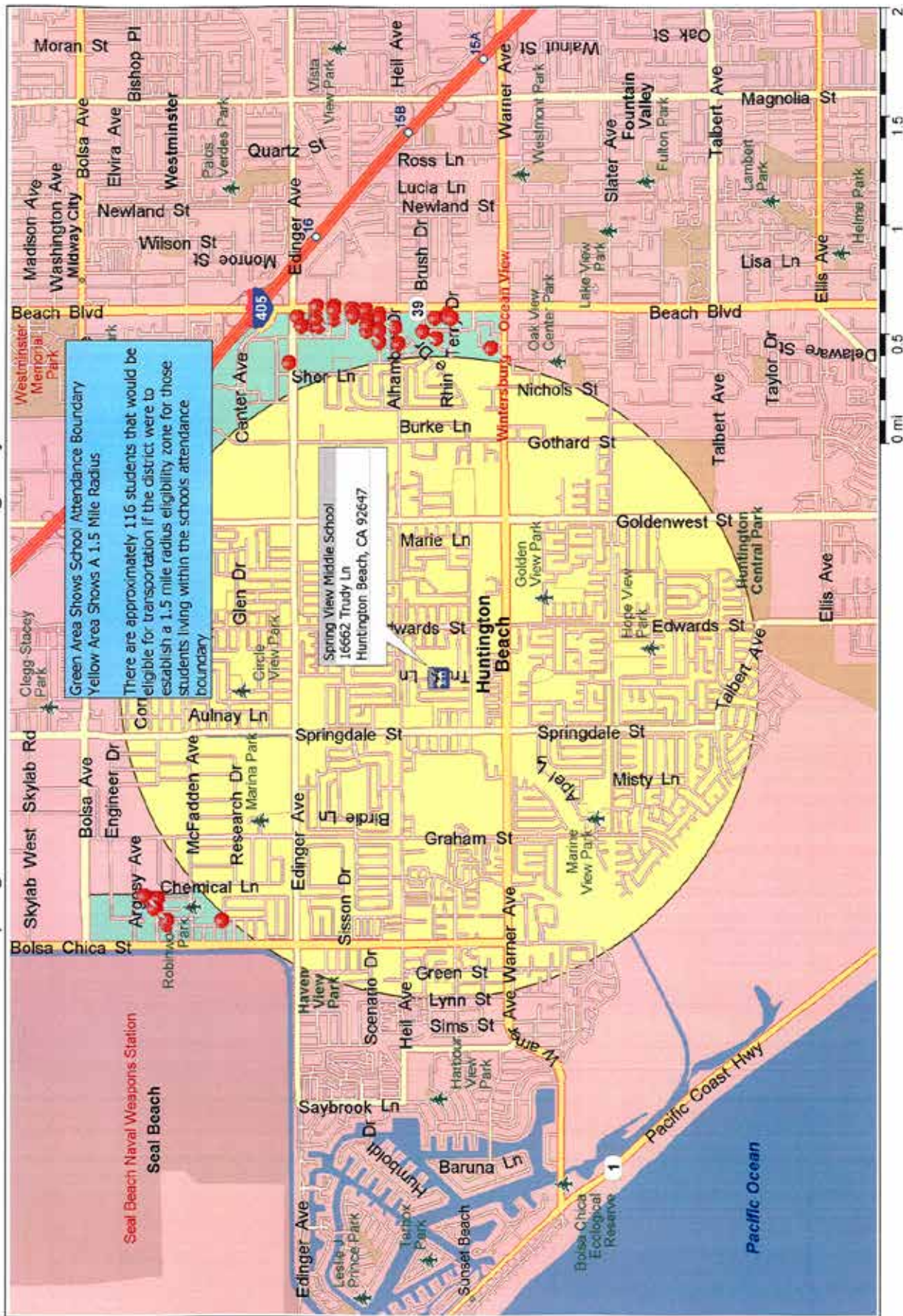


# Oak View State Preschool .5 Mile Eligibility Zone





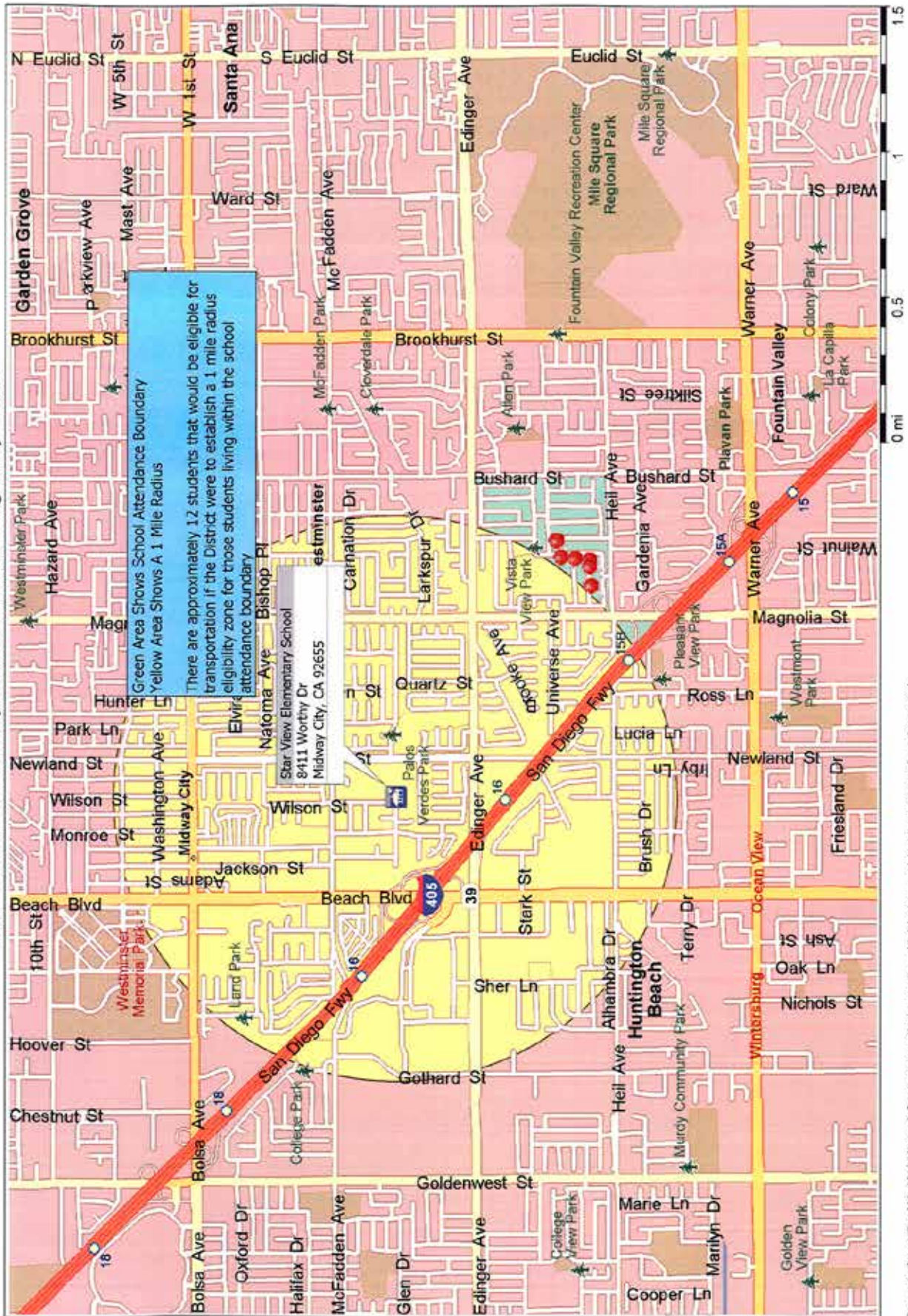
### Spring View Middle School 1.5 Mile Eligibility Zone



Copyright © and (P) 1908-2010 Microsoft Corporation and/or its suppliers. All rights reserved. <http://www.microsoft.com/maps/>  
 Certain mapping and direction data © 2010 NAVTEQ. All rights reserved. This data for areas of Canada includes information taken with permission from Canadian authorities, including © Her Majesty the Queen in Right of Canada. © Queen's Printer for Ontario. NAVTEQ and NAVTEQ ON ECARD are trademarks of NAVTEQ. © 2010 Tele Atlas North America, Inc. All rights reserved. Tele Atlas and Tele Atlas North America are trademarks of Tele Atlas, Inc. © 2010 by Applied Geographic Systems. All rights reserved.



# Star View Elementary School 1 Mile Eligibility Zone



Copyright © and (P) 1988-2010 Microsoft Corporation and/or its suppliers. All rights reserved. <http://www.microsoft.com/maps/>  
 Certain mapping and direction data © 2010 NAVTEQ. All rights reserved. This data for areas of Canada includes information taken with permission from Canadian authorities, including © Her Majesty the Queen in Right of Canada. © Queen's Printer for Ontario. NAVTEQ and NAVTEQ ON BOARD are trademarks of NAVTEQ. © 2010 Tele Atlas North America, Inc. All rights reserved. Tele Atlas and Tele Atlas North America are trademarks of Tele Atlas, Inc. © 2010 by Applied Geographic Systems. All rights reserved.





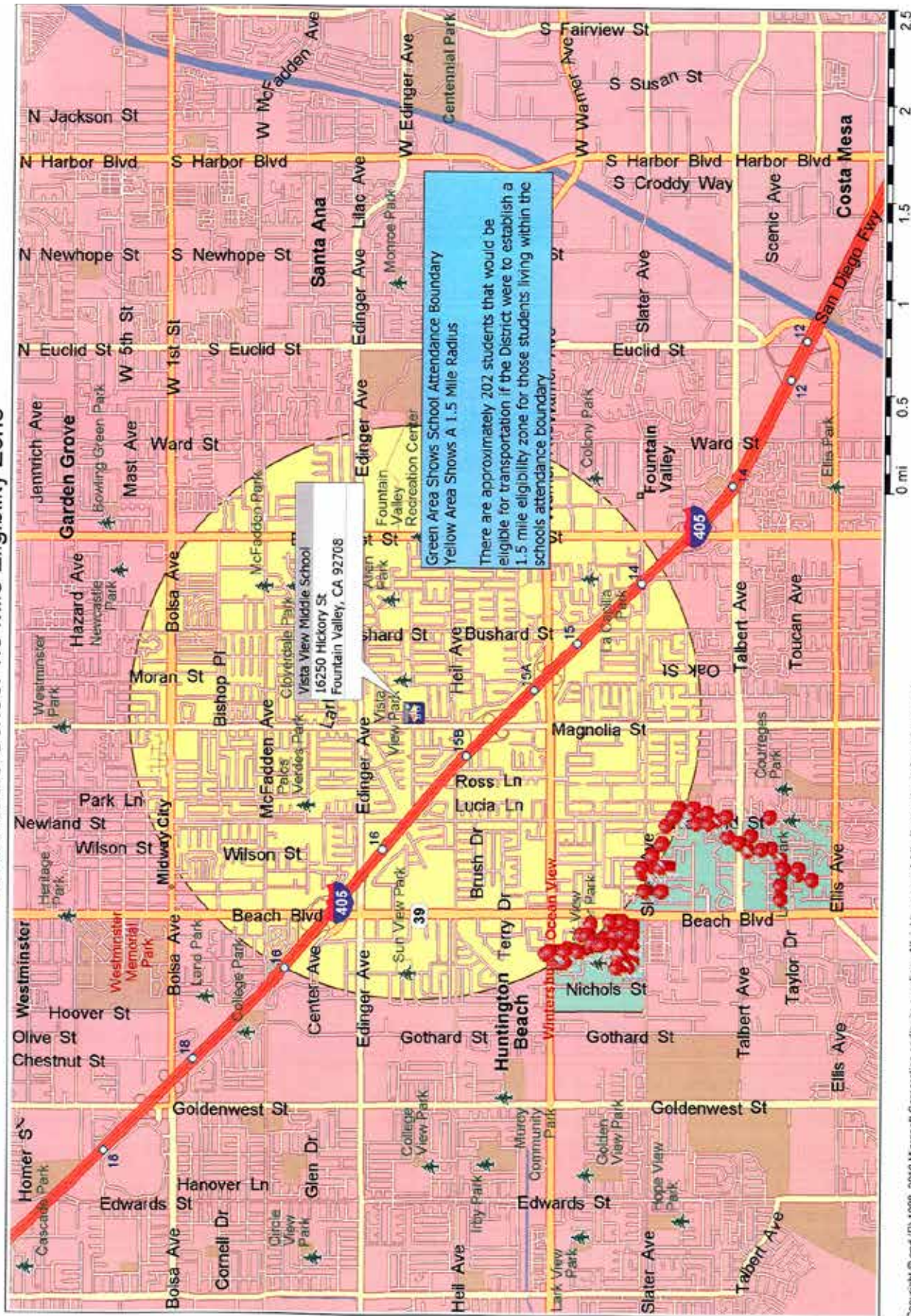


[illegible]

Copyright © and (P) 1988–2010, Microsoft Corporation and/or its suppliers. All rights reserved. <http://www.microsoft.com/happoinit/>  
 Certain mapping and direction data © 2010 NAVTEQ. All rights reserved. The Data for areas of Canada includes information taken with permission from Canadian authorities, including © Her Majesty the Queen in Right of Canada, © Queen's Printer for Ontario, NAVTEQ and NAVTEQ ON BOARD are trademarks of NAVTEQ. © 2010 Tele Atlas North America, Inc. All rights reserved. Tele Atlas and Tele Atlas are trademarks of Tele Atlas, Inc. © 2010 by Applied Geographic Systems. All rights reserved.



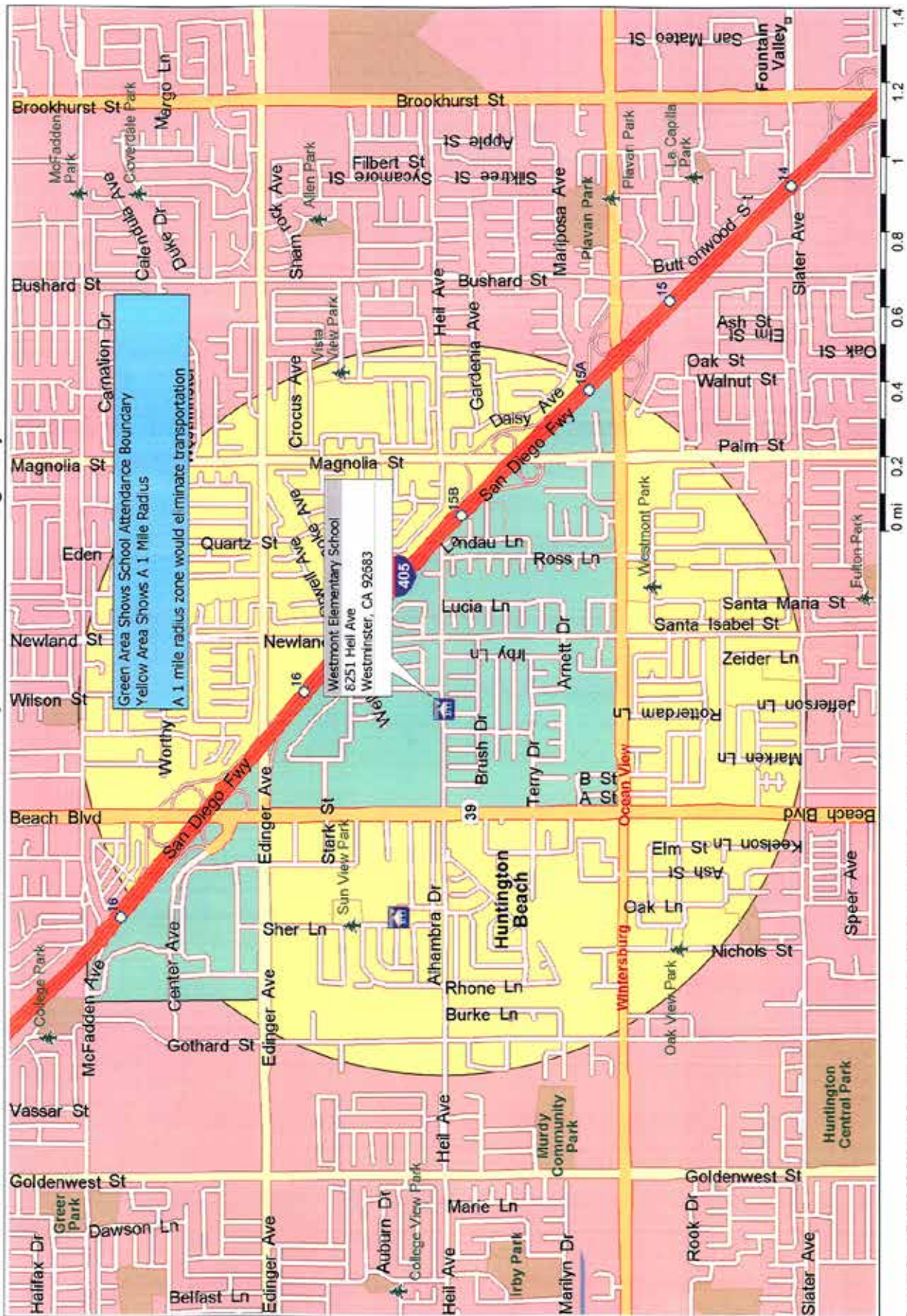
# Vista Middle School 1.5 Mile Eligibility Zone



Copyright © and (P) 1998-2010 Microsoft Corporation and/or its suppliers. All rights reserved. <http://www.microsoft.com/maps/>  
 Certain mapping and direction data © 2010 NAVTEQ. All rights reserved. The data for areas of Canada includes information taken with permission from Canadian authorities, including: © Her Majesty the Queen in Right of Canada. © Queen's Printer for Ontario. NAVTEQ and NAVTEQ ON BOARD are trademarks of NAVTEQ. © 2010 Tele Atlas North America, Inc. All rights reserved. Tele Atlas and Tele Atlas North America are trademarks of Tele Atlas, Inc. © 2010 by Applied Geographic Systems. All rights reserved.



# Westmont Elementary School 1 Mile Eligibility Zone



Copyright © and (P) 1988-2010 Microsoft Corporation and/or its suppliers. All rights reserved. <http://www.microsoft.com/maps/>  
 Certain mapping and direction data © 2010 NAVTEQ. All rights reserved. This data for areas of Canada includes information taken with permission from Canadian authorities, including © Her Majesty the Queen in Right of Canada. © Queen's Printer for  
 Ontario. NAVTEQ and NAVTEQ ON BOARD are trademarks of NAVTEQ. © 2010 Tele Atlas North America, Inc. All rights reserved. Tele Atlas and Tele Atlas North America are trademarks of Tele Atlas, Inc. © 2010 by Applied Geographic Systems, All  
 rights reserved.



## Appendix B

CSIS California School Information Services

---

**FISCAL CRISIS & MANAGEMENT ASSISTANCE TEAM  
STUDY AGREEMENT  
April 11, 2012**

The FISCAL CRISIS AND MANAGEMENT ASSISTANCE TEAM (FCMAT), hereinafter referred to as the Team, and the Ocean View 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 Ocean View 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:

The Ocean View School District, consisting of grades K-8 is requesting that the FCMAT Team conduct a review of the Regular Home to School and Special Education Transportation Services. The District's student enrollment is approximately 9,500 students and provides student transportation for home to school and special education services for approximately 1,450 students. The following scope of work is provided:

- 1) Conduct a review of the transportation budget utilizing two years of Audited Financial Statements to provide a comparative cost analysis with the 2011-12 fiscal year budget that will include the following components.

The objective is to determine district trends for revenues and expenditures and make recommendations to reduce encroachment, if any for both home to school and special education transportation

- a) Budget Planning and Development Process
  - b) Budget amendment procedures
  - c) Budget Assumptions for 2011-12 by Resource
  - d) Budget to Actuals comparison for two historical years
  - e) 2011-12 Operating Budget
  - f) Operating Revenues and Expenditures as a percent of the total budget
  - g) Operating Revenue
  - h) Revenue line item explanations
  - i) Operating Expenditures
  - j) Expenditure line item explanations
  - k) Sources and Uses of Funds
  - l) Debt Obligations
  - m) Operating Improvements
  - n) Capital Improvements
  - o) Capital Contingency Fund
  - p) Capital Asset Distribution
  - q) Interagency transfer of funds
- 2) Provide recommendations for appropriate staffing levels and the organizational structure for the transportation department using comparative school districts. Comparisons will be made to six school district departmental operations of similar size and structure regarding productivity and efficiency models and shall include the following components:
- a) Personnel Summary by District position
  - b) Review Job Descriptions of each district position
  - c) Review customer service records or logs
  - d) Review professional development training by position
- 3) Review specifically the transportation services department and include the following: Operations, Routing, and Scheduling and make recommendations to improve the operational efficiency for both Home to School and Special Education Transportation.
- a) Review Student Demographic Data
  - b) Evaluate Average Weekly Ridership by Site, Resource & District and provide a forecast summary
  - c) Evaluate the routing methodologies including the use of automated routing software

- d) Evaluate the number of routes including board policies regarding walking distances
- e) Review the department's on time performance and efficiency review
- f) Evaluate the department's vehicle maintenance and inspection reports
- g) Review the bus loading and student counts for each route
- h) Evaluate the department's School Bus Inventory, School Bus Replacement Schedule and Equipment availability
- i) Review Field Trips and scheduling of buses
- j) Review the department's customer service or complaint logs
- k) Review the IEP process for student transportation
- l) Review board policies, administrative regulations and past practices regarding voluntary desegregation and open enrollment policies for busing students.

#### B. Services and Products to be Provided

Orientation Meeting - The Team will conduct an orientation session at the District to brief District management and supervisory personnel on the procedures of the Team and on the purpose and schedule of the study.

On-site Review - The Team will conduct an on-site review at the District office and at school sites if necessary.

1. 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.
2. 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.
3. Draft Reports - Electronic copies of a preliminary draft report will be delivered to the District administration for review and comment.
4. Final Report - Electronic copies of the final study report will be delivered to the District administration following completion of the review. Written copies are available by contacting the FCMAT office.



5. 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. Deborah Deal, CFE</i>	<i>FCMAT Fiscal Intervention Specialist</i>
<i>B. Timothy Purvis</i>	<i>FCMAT Consultant</i>
<i>C. Michael Rea</i>	<i>FCMAT Consultant</i>
<i>D. To Be Determined</i>	<i>FCMAT Fiscal 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 \$15,000.**

- 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 for both the District and Transportation Department
  - 4. Current and two (2) prior years' audit reports
  - 5. Financial Activity Reports for both Home to School and Special Education Transportation by detail object and resource for the 2009-10, 2010-11 and 2011-12 fiscal years.
  - 6. List of all bus routes
  - 7. Bell schedules for each site
  - 8. Job descriptions for each position in the Transportation Department
  - 9. Transportation Handbook
  - 10. School Bus Inventory and Replacement Schedule
  - 11. Board Policies and Administrative Regulations for Transportation
  - 12. Any documents requested on a supplemental listing
  - 13. Any documents requested on the supplemental listing should be provided to FCMAT in electronic format when possible.
  - 14. Documents that are only available in hard copy should be scanned by the district and sent to FCMAT in an electronic format.
  - 15. 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>Orientation:</b>	<i>May/June, 2012</i>
<b>Staff Interviews:</b>	<i>to be determined</i>
<b>Exit Interviews:</b>	<i>to be determined</i>
<b>Preliminary Report Submitted:</b>	<i>to be determined</i>
<b>Final Report Submitted:</b>	<i>to be determined</i>
<b>Board Presentation:</b>	<i>to be determined</i>
<b>Follow-Up Support:</b>	<i>if requested</i>

## 7. CONTACT PERSON

Name of contact person: Mark Schiel

Telephone: (714) 847-2551 x1413 FAX: (714) 842-1541

E-Mail: mschiel@ovsd.org

William V. Loose 5-02-12

William V. Loose, Superintendent  
Ocean View School District

Date

Anthony L. Bridges April 11, 2012

Anthony L. Bridges, CFE  
Deputy Executive Officer  
Fiscal Crisis and Management Assistance Team

Date