



# **Santee School District**

## **Transportation Review**

April 21, 2009

Joel D. Montero  
Chief Executive Officer





April 21, 2009

Lisbeth A. Johnson, Ed.D., Superintendent  
Santee School District  
9625 Cuyamaca Street  
Santee, Ca. 92071

Dear Superintendent Johnson:

In November 2008, the Fiscal Crisis and Management Assistance Team (FCMAT) received a request for assistance from the Santee School District. FCMAT subsequently developed a study agreement with the district, requiring the team to complete the following:

1. Conduct a review of the district's transportation program and operations.
2. Develop basic talking points for the district to use in communications with parents of regular and special education students during the process of identifying alternatives for transportation services, including parent transportation contracts.
3. Provide recommendation for a new bus routing methodology based on a standardized district wide school bell schedule and the most efficient use of transportation routes.
4. Review bus routes in areas considered unsafe and provide recommendations for changes to improve route safety. Provide an estimate of the cost to implement the recommendations and identify possible funding sources, including parent fees.
5. Analyze the fiscal impact of current bargaining contract provisions related to transportation including wait time, field trips, extra duty, additional benefits, overtime and hourly activities.
6. Evaluate the current in-house bus maintenance activities and provide recommendations for cost savings and improvement.
7. Provide recommendations for communication strategies with parents and the community if the district considers reductions in transportation services.

**FCMAT**

Joel D. Montero, Chief Executive Officer

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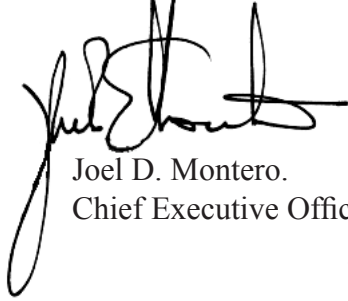
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Administrative Agent: Larry E. Reider - Office of Kern County Superintendent of Schools

FCMAT visited the district to conduct interviews, gather information, and collect data. This report is the results of those activities.

Thank you for allowing us to serve you, and please give our regards to all the employees of the Santee School District.

Sincerely,

A handwritten signature in black ink, appearing to read 'Joel D. Montero', with a stylized, flowing script.

Joel D. Montero.  
Chief Executive Officer

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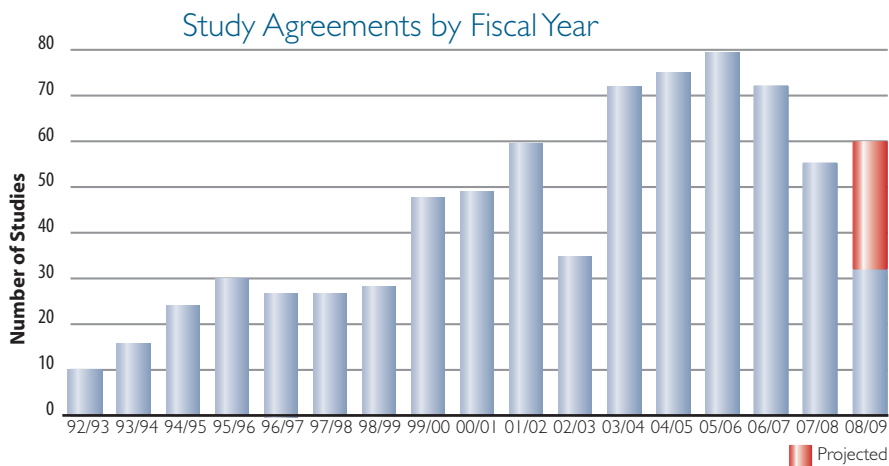
## Foreword - FCMAT Background

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

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

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

Since 1992, FCMAT has been engaged to perform nearly 750 reviews for local educational agencies, including school districts, county offices of education, charter schools and community colleges. Services range from fiscal crisis intervention to management review and assistance. FCMAT also provides professional development training. The Kern County Superintendent of Schools is the administrative agent for FCMAT. The agency is guided under the leadership of Joel D. Montero, Chief Executive Officer, with funding derived through appropriations in the state budget and a modest fee schedule for charges to requesting agencies.



Total Number of Studies.....743  
 Total Number of Districts in CA 982

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

Note: Some districts had multiple studies.  
 ● Districts (7) that have received emergency loans from the state. (Rev. 1/22/09)





# Introduction

## *Background*

The Santee School District serves approximately 6,200 students in grades kindergarten through eight in eastern San Diego County, 18 miles northeast of the city of San Diego. The district has nine schools and covers approximately 26 square miles.

In November, 2008 the Santee School District and the Fiscal Crisis and Management Assistance Team (FCMAT) entered into an agreement to provide a review of the district's transportation programs and services. Specifically, the agreement states that FCMAT will perform the following:

1. Conduct a review of the district's transportation program and operations.
2. Develop basic talking points for the district to use in communications with parents of regular and special education students during the process of identifying alternatives for transportation services, including parent transportation contracts.
3. Provide recommendations for a new bus routing methodology based on a standardized districtwide school bell schedule and the most efficient use of transportation routes.
4. Review bus routes in areas considered unsafe and provide recommendations for changes to improve route safety. Provide an estimate of the cost to implement the recommendations and identify possible funding sources, including parent fees.
5. Analyze the fiscal impact of current bargaining contract provisions related to transportation including wait time, field trips, extra duty, additional benefits, other overtime and hourly activities.
6. Evaluate the current in-house bus maintenance activities and provide recommendations for costs savings and improvements.
7. Provide recommendations for communication strategies with parents and the community if the district considers reductions in transportation services

## *Study Team*

The study team was composed of the following members:

William P. Gillaspie, Ed.D.  
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Director of Transportation  
Poway Unified School District  
Poway, CA

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Cajon Valley Elementary School District  
El Cajon, CA

JoAnn Murphy  
FCMAT Consultant  
Santee, CA

Leonel Martínez  
FCMAT Public Information Specialist  
Bakersfield, CA

\*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 district on February 17-20, 2008 to conduct interviews, collect data and review documents. This report is the result of those activities and is divided into the following sections:

- I. Executive Summary
- II. Communication Strategies for Alternative Transportation Services
- III. District Bell Schedule and Routing Methodology
- IV. Fiscal Impact of Bargaining Contract Provisions
- IV. Vehicle Maintenance
- V. Other Areas of Potential Savings
- VI. Communication Strategies for Reduction in Transportation Services
- VII. Appendices

# Executive Summary

According to the 2008 Annual Report of Pupil Transportation, or Form TRAN, the Santee School District transports approximately 307 regular education home-to-school students and 157 special education students daily. That report also indicates the district's Transportation Department has 18 school buses with 18 scheduled routes and traveled 188,303 miles.

School district personnel are generally satisfied with the district's level of performance for transportation services and find the staff responsive and cooperative. The district recently decreased its home-to-school transportation program because of increased costs and proposed budget reductions by the state. As a result, only five of the district's nine schools have some level of home-to-school regular education transportation. The special education transportation program provides transportation services to students at all nine district school sites and six out-of-district nonpublic school and programs.

The regular education transportation program encroaches or exceeds the anticipated revenue in the district's general fund by approximately \$235,013. The special education transportation program encroaches by approximately \$540,621 for a total district encroachment of \$775,634. This figure also includes an approximate \$50,000 in transportation revenue generated by services provided to the Boys and Girls Club.

The district transportation program had a budget of \$1,280,634 and received approximately \$505,000 in state reimbursement for both special education and regular education transportation services for the 2007-08 fiscal year. In the 2007-08 fiscal year, the district received \$360,000 in state reimbursement for special education transportation and \$145,000 in state reimbursement for regular education transportation. The district also generated approximately \$50,000 in revenue from transportation services provided to the Boys and Girls Club for that entity's after-school programs. In total, Santee received \$555,000 in transportation reimbursement and revenue, amounting to 43% of its approved transportation expense and resulting in an excess cost of 57%. With an encroachment of 57% for the 2007-08 school year, the district is slightly above the statewide average encroachment of 55%.

The district could reduce its operating expenses by approximately \$150,000 if it eliminated two bus routes by implementing the following changes:

- Adopting a one-mile nontransportation zone without recognition of hazard or safety criteria for ineligible students.
- Implementing a two-tiered bell schedule with a 45-minute division of time.

All special education students that receive transportation services have these services identified on their Individualized Education Programs (IEP). The number of vehicles utilized to transport the population of special education and regular education students receiving service is slightly greater than expected when considering the passenger capacities of the types of school buses operated.

The district's master bell schedule is not sufficiently staggered to produce the most efficient student transportation routing schedule. All nine district schools start within 55 minutes of one another with varying dismissal times, and individual sites have several dismissal times for specific grade groupings. Modified day calendars are site specific and can have several dismissal times within age groupings. As a result, a greater number of buses is utilized than necessary.

Because the district has low numbers of regional or clustered programs that would facilitate transportation efficiency, special needs school bus routes transport students to each site. All stakeholders; teachers, support staff and parents; should be informed about the challenges of efficient transportation routing. A better understanding of this issue will enable important decisions to be made on a common modified day schedule. The district could also benefit from a standardized tiered bell schedule that allows for effective pick-up and delivery of all transported students.

The district should develop clear direction through a board policy that delineates the level of voluntary nonmandated home-to-school transportation services to be offered and how it will be provided. Administrative operating procedures should be developed to specifically state which students are eligible for home-to-school regular education transportation as well as to identify any policy exceptions that involve issues such as traffic and student safety criteria. Other options for student transportation may include parent/district contractual arrangements for in-lieu transportation when this is in the student's best interest and benefits the district financially. Such a policy should be closely monitored by appropriate district personnel and should be administered only when developed policy guidelines are met.

Technology may help the district administer the specific general functions of a student transportation program including routing, vehicle maintenance, safety and training records maintenance, field trip scheduling and employee time tracking. Because the district does not have accurate data on individual vehicle cost per mile and labor expense tracking to specific vehicles, important discussions and financial analysis do not occur regarding school bus fleet replacement. The district also lacks a school bus replacement plan. The newest school bus is a 1999 model with several units exceeding 250,000 and 300,000 accumulated miles.

Two additional areas merit review that could prompt further savings. The district may be able to meet its two-way radio communications needs with a less costly provider.

The San Diego-Imperial Counties Regional Communication System (RCS) provides the district with a direct communication link to all major emergency first responders in the two counties, but this service is also expensive. Other alternatives to two-way radio communication exist and should be reviewed to determine what would best serve district needs.

The district should carefully analyze its revenue loss in the Project Safe after-school program to determine whether there is a direct correlation to the district's independent contract with the local Boys and Girls Club. This contract provides district students with fee-based transportation to the Boys and Girls Club open access after-school program. Revenues generated by the Transportation Department are used to offset the transportation program's encroachment on the general operating fund. These revenues may be negated by the higher revenue losses that could occur if parents left the Project Safe program to enroll in the less costly Boys and Girls Club program.



# Findings and Recommendations

## Communication Strategies for Alternative Transportation Services

The Santee School District lacks a formal administrative procedure regarding optional in-lieu transportation. The California Education Code permits a school district to offer in-lieu transportation and collect reimbursement expenses based on the amount deemed as reimbursable by the Internal Revenue Service (IRS) as a possible solution to specific special education transportation needs.

This would be a viable and less expensive option for the district when only one or two students require transportation to attend a program outside the district boundary. However, the district should reserve the right to cancel any arrangements for parent in-lieu transportation contracts. Cancellation could occur if changing conditions cause the district to experience an increase in the number of students transported to programs, making it more financially beneficial to use a bus or other transportation arrangement.

A parent in-lieu contract should always be at the district's discretion and should be used with the parents' understanding that the contract is mutually agreeable, but can be eliminated if the district finds a more resourceful manner to transport students.

The following talking points will assist the district in communication with parents regarding in-lieu transportation contracts:

1. When only one or two students require transportation to attend a special education program, the district has the option to contract with parents to provide that service for their student in lieu of district bus services.
2. When available roads are impassable or impractical for buses to access, the district has the option to contract with parents to provide that service for any student in lieu of district bus services.
3. The California Education Code permits a school district to offer in-lieu costs for transportation to parents at the current accepted Internal Revenue Service (IRS) mileage rate.
4. These costs include mileage to and from school each day. The costs do not include reimbursement for a parent's time in transporting the student.

5. The district and parent will enter into a written contract outlining the in-lieu agreement that will not exceed a duration of one school year. The contract can be renewed each year if the district determines that it is still appropriate to do so. A sample contract is attached as Appendix A to this report.
6. The district retains the responsibility to provide transportation as a related service for students with disabilities if parents do not agree or are unable to enter into an in-lieu contract with the district.
7. If the district finds a more resourceful manner to transport the student, the contract for in-lieu services can be eliminated.

## Recommendations

*The district should:*

1. Develop effective communication strategies regarding in-lieu transportation such as the following:
  - Developing administrative regulations to offer in-lieu transportation reimbursement to parents as a possible solution to specific special education transportation needs. Clear guidelines should be provided, detailing when in lieu transportation can be used.
  - Providing training for all district staff members to ensure an understanding of the options available through in-lieu transportation.
  - Incorporating a section on transportation in the special education handbook that provides guidance to the staff and IEP teams regarding the use of in-lieu transportation.
  - Providing IEP teams with training that includes collaboration and consensus-building regarding transportation decisions among parents, educators and transportation personnel.
  - Including in-lieu transportation options and guidelines in the parent handbook and district Web site.
  - Ensuring that resource parents, whose role provides direct support and information for parents of students with disabilities, are trained to provide information about transportation as a related service on the IEP, including in-lieu transportation services.



## District Bell Schedule

The district has nine schools and one alternative education program, Santee for Success. Daily home-to-school transportation services are offered at five schools for regular education transportation and all sites for special education transportation. Five schools, including Santee for Success, have no home-to-school regular education transportation service. Eight schools serve kindergarten through eighth-grade students, and one site serves students in kindergarten through sixth grade.

District data on daily one-way student ride counts shows that approximately 307 regular education students receive home-to-school transportation, and an additional 157 students receive transportation as a related support service identified through their Individualized Education Program (IEP) for special education.

The district bell schedule is difficult for the transportation program to support efficiently. All nine schools, including the alternative education program, start within 55 minutes of each other. The district has the following four tiers of start times:

Tier I		
<b>CHET F. HARRITT SCHOOL (k-8)</b>	<b>Start</b>	<b>End</b>
Kindergarten - Grade 3	7:45	1:50
Grades 4 - 8		2:30
Modified Day		12:30
Minimum Day		12:30
<b>HILL CREEK SCHOOL (k-8)</b>	<b>Start</b>	<b>End</b>
Kindergarten - Grade 3	7:45	1:36
Grades 4 - 6		2:01
Grades 7 - 8		2:06
Minimum Day		11:45
<b>CARLTON HILLS SCHOOL (k-8)</b>	<b>Start</b>	<b>End</b>
Kindergarten - Grade 3	7:50	1:35
Grades 4 - 6		2:00
Grades 7 - 8		2:11
Minimum Day		12:05
Tier II		
<b>PROSPECT AVENUE SCHOOL (k-8 SP)</b>	<b>Start</b>	<b>End</b>
Kindergarten - Grade 3	8:00	2:00
Grades 4 - 8		2:30
Modified Day		1:00
Minimum Day		11:45
<b>CAJON PARK SCHOOL (K-8)</b>	<b>Start</b>	<b>End</b>
Kindergarten	8:00	1:40
Grades 1 - 3		1:45
Grades 4 - 8		2:10
Minimum Day		11:45
Modified Day (Kindergarten Only)		12:00

Tier III		
<b>PEPPER DRIVE SCHOOL K-8 (SP)</b>		
	<b>Start</b>	<b>End</b>
Kindergarten	8:30	1:30
Grades 1 - 3 & Grades 6 - 8		2:35
Grades 4 - 5		3:05
Modified Day & Minimum Day		
Kindergarten		12:20
Grades 1 - 3		12:50
Grades 4 - 5		12:55
Grades 6 - 8 (No Modified Day)		1:00
<b>RIO SECO SCHOOL (k-8)</b>		
	<b>Start</b>	<b>End</b>
Kindergarten	8:30	2:00
Grades 1 - 3		2:35
Grades 4 - 8		3:05
Modified Day		12:45
Minimum Day		12:45
<b>SANTEE SUCCESS PROGRAM (5-8)</b>		
	<b>Start</b>	<b>End</b>
Grades 5 - 8	8:30	3:00
Minimum Day		1:00
<b>CARLTON OAKS SCHOOL (K-8)</b>		
	<b>Start</b>	<b>End</b>
Kindergarten - Grade 3	8:32	2:35
Grades 4 - 6		3:05
Grades 7 - 8		3:10
Modified Day    Grades 7 - 8 End at 12:40		12:35
Minimum Day    Grades 7 - 8 End at 12:40		12:35
Tier IV		
<b>SYCAMORE CANYON SCHOOL (K-6)</b>		
	<b>Start</b>	<b>End</b>
Kindergarten	8:40	2:00
Grades 1 - 3		2:20
Grades 4 - 8		2:45
Minimum Day    Grades 4 - 6 End at 12:35		12:30

Individual school modified days, defined as days with reduced instructional minutes to allow for staff collaboration and in-service, are unique to each school site. A review of school calendars indicates that schedules may even be unique between grade groupings at the same school. There is no systematic approach to scheduling modified days in coordination with all district school sites. The collective bargaining unit contract allows teachers to establish instructional minutes that allow for a modified day calendar at each site. Grade groupings within a school site may choose independent modified day calendars specific to their groupings. As a result, school sites independently select modified day calendars to meet the individual needs of school site teaching staffs. This prohibits any type of district-driven coordination as well as districtwide grade groupings. The district should consider developing a standard districtwide modified day calendar. This could help reduce the number of transportation routes required and enhance bus scheduling, allowing for more timely service.

The district's regular education and special education school bus routing could be made more efficient with the implementation of a sufficiently staggered or multitiered master bell schedule. The transportation program uses five buses to provide daily transportation service for approximately 307 regular education students and 13 buses to transport approximately 157 special education students. It is evident that full passenger capacity is not being utilized because insufficient route time (the time needed to operate a single bus run to pick up students in a timely manner) exists between individual school start times.

The greatest transportation routing efficiency occurs when transportation services for both regular education and special education home-to-school support are scheduled to meet the transportation demands of students attending schools on a multitiered master bell schedule. This type of schedule allows for the fewest number of buses to perform two or three bus runs or routes in the morning and afternoon. Individual schools would stagger their start and dismissal times.

The district is approximately 26 square miles in size and located in a city that has typical suburban traffic pattern for a population of 54,700. Although only five of the district's nine school sites and programs receive regular education home-to-school daily transportation, all sites receive some level of special education daily transportation. Because of the district's size and number of schools, it would be more efficient to implement a two-tiered master bell schedule for all sites, with a 45 minute window between the first tier and second tier start and dismissal times. This district could consider regionalizing the grouping of schools with the same start time to assist with collaboration efforts.

Discussions should be held with all affected parties regarding the implementation of a staggered district bell and a common districtwide master day calendar that allows for site-level grade grouping and districtwide professional staff development opportunities. This effort should provide sufficient time for all affected parties to offer comments and submit ideas. Interviews with staff members also suggested that information on the transportation budget and the operational challenges faced by the transportation program should be communicated more clearly to all affected parties.

The district should consider implementing these changes for the 2010-2011 school year; however, they could begin as early as the 2009-2010 school year if the district considers this a top priority because of the state's budget crisis.

## Recommendations

*The district should:*

1. Consider the benefits of standardizing the master bell schedule to create a minimum of two tiers of school start and dismissal times, allowing for a minimum of 45 minutes between tiers.
2. Begin discussions with all affected parties on the financial savings and expanded professional development that could be realized by agreeing on a central modified day master calendar for all school sites.
3. Increase communication with all affected parties regarding the development of the transportation operating budget, the operational challenges that are faced in routing and how these challenges are affected by the district's school site bell schedules and common collaboration days.

## Routing Methodology for Greater Efficiency

The Transportation Department schedules regular education routing using four buses. A review of student load counts found that the bus fleet is not utilized to its maximum student capacity. There is insufficient time between school start and/or dismissal times to appropriately load some buses on scheduled routes. Special education transportation uses 14 school buses to provide transportation for all nine district schools as well as six special education program sites outside district boundaries. The district's 24 special education students attend six separate program sites outside the district. Eighteen preschool students attend the Wintergarden infant program located at the Lakeside Union School District.

The relatively short length of time between school starts and dismissals prevents buses from fully utilizing their passenger capacities and may prompt a need for more units than would otherwise be necessary. Routing is based on the varying start and dismissal times of the district schools. Units travel to and from neighborhoods quickly to arrive at schools by delivery times, and a single school may have insufficient minutes or short take-home periods between dismissal times and/or grade grouping times, which ultimately prevents a more efficient routing schedule. With more time allotted, buses could pick up and deliver additional students for better utilization of passenger capacities.

A high percentage of the district's special needs students who receive transportation services are transported to programs outside their home school. However, program offerings are available for many of these students at their home schools.

The district lacks a specific school board policy and administrative procedure for regular education transportation. Although the board has used specific agenda items to take action on transportation services, these actions often related to a boundary shift, program closure or traffic/road condition safety concern. As a result, district transportation services for regular education have become inconsistent and are generally driven by safety issues. The district has established a two-mile nontransportation zone around all schools with exceptions for safety related matters. This change significantly reduced regular education transportation home-to-school service in most areas and eliminated service at some school sites.

Attached as Appendix B to this report are maps of school attendance areas for the five sites that receive regular education home-to-school transportation. These maps were created by entering the district's student data into software called Microsoft Map Point. Each map has radius measurements that represent nontransportation zones of one mile, one and one-half mile and two miles around the school. The maps include a data box that lists the number of students in specific grade groupings that could be eliminated from transportation services if these zones were adopted as policy. At present, the district does not provide transportation based on the criteria used to develop these maps in part because the maps do not consider safety criteria.

The maps and data show that the adoption of a two-mile nontransportation zone would eliminate home-to-school transportation services at all schools. A one-and-one-half-mile nontransportation zone would eliminate transportation at all schools except Prospect Avenue Elementary, which would have a minimal number of students eligible for the service. The adoption of a one-mile home-to-school nontransportation zone would allow the district to reduce the number of home-to-school regular education transportation bus routes from four to two. The remaining routes would serve eligible students from Prospect Avenue, Pepper Drive, Hill Creek and Chet F. Harritt elementary schools. All these scenarios assume that the district would also eliminate hazard or safety criteria.

In practice, the district's recognition of hazard criteria necessitates the existence of a program for regular education home-to-school transportation. The following chart lists the numbers of students at each school with the estimated number of buses that the district would need if a one-mile nontransportation zone was adopted.

**Students Qualified for Transportation if the District Used Radiuses to Determine Eligibility**

School	Students Living within School Boundary	1 Mile Radius	Buses Needed	1.5 Mile Radius	Buses Needed	2 Mile Radius	Buses Needed
Carlton Hills	285	0	0.0	0	0.0	0	0.0
Chet F. Harritt	430	41	1	0	0.0	0	0.0
Hill Creek	538	31	1	0	0.0	0	0.0
Pepper Drive	460	112	2	0	0.0	0	0.0
Prospect Avenue	473	82	1	5	0	0	0.0

**Students Currently Being Transported by the District**

School	Students Living within School Boundary	Regular Student				Total Regular Ed
		AM	Buses	PM	Buses	
Carlton Hills	285	16	1	16	1	32
Chet F. Harritt	430	50	1	87	1	137
Hill Creek	538	40	1	45	1	85
Pepper Drive	460	115	3	103	2	218
Prospect Avenue	473	45	1	50	1	95

*1.5 Mile Radius would eliminate transportation*

District student data indicates that a high number of students use inter- and intra-district transfers. This review does not consider transportation services for students not residing within the school boundary according to the district policy that prohibits transfer students from receiving transportation services. Eighteen students within the Carlton Hills Elementary School boundary live within a 1.5 mile radius of the school.

The district's home-to-school regular education transportation budget is approximately \$300,000. Four buses provide regular education home-to-school bus routes, costing approximately \$75,000 each to operate for the 2008-09 school year. The district could reduce its operating expenses by approximately \$150,000 if it eliminated two bus routes by implementing the following changes:

- Adopting a one-mile nontransportation zone without recognition of hazard or safety criteria for ineligible students.
- Implementing a two-tiered bell schedule with a 45-minute division of time.

According to the Annual Report of Pupil Transportation, or Form TRAN, the district received \$145,000 in state reimbursement in 2007-08. If program expense decreases to less than the state reimbursement, the reimbursement will be reduced accordingly. Therefore, the district may benefit from maintaining expenses in accordance with the state reimbursement. Once district reimbursement levels decrease, they historically have remained at the lower level, even if expenses rose.

The district should create a board policy on the delivery of regular education home-to-school transportation and an administrative procedure with specific guidance on how this service will be consistently provided. Education Code Section 39800-39860 does not require districts to provide home-to-school regular education transportation. No code requirements officially recognize student safety and traffic concerns. The district is sensitive to the issue of safety for students living in certain areas. As a result, transportation is provided liberally for students who live reasonably close to their schools of attendance.

The district's special education bus routes service all school sites; however, regionalizing or clustering some programs may enable a reduction in routing. This issue would need further review by special education personnel to determine how the benefit to affected students compares with the potential reduction in operational cost.

Several industry specific routing software packages can help create routes and develop routing directions. Many offer several modules for areas such as vehicle maintenance; safety and training records for school bus instruction and in-services; and field trip scheduling. A few can track employee time. The district should consider the benefits of computerized record-keeping when compared with manual tracking, which is much less efficient. Computerized expense tracking may also help the district develop the budget and anticipate different scenarios in times of budget reduction.

## Recommendations

*The district should:*

1. Evaluate the financial impact on the general fund of recognizing specific types of safety and road hazards, necessitating the existence of regular education home-to-school transportation. When addressing traffic safety concerns, the district should establish a clear administrative procedure to specify when transportation services may be provided as an exception for students living in a nontransportation zone. Specific types of safety concerns should be identified.
2. Establish a board policy on providing regular education home-to-school student transportation using transportation and nontransportation zones for each school based on a determined radius measurement.
3. Create an administrative procedure that provides clear instructions on the application of regular education home-to-school student transportation.
4. Develop all parent in-lieu contracts based on a developed board policy and administrative procedure. The transportation program should review these contracts annually to ensure that the implementation these contracts continue to be in the district's financial interest.
5. Study the benefits for students and the operational cost savings of regionalizing or clustering some offerings in the special education program.
6. Review the benefits of implementing specific computer software systems to help in routing, maintaining vehicles, keeping safety and training records, scheduling field trips and keeping time for employee.
7. Evaluate the special education program to ensure students are placed in a home school program when appropriate.



## Fiscal Impact of Bargaining Contract Provisions

The district's modified day calendars are numerous and complex, making it difficult for the transportation program to support in a financially efficient, consistent and timely manner. In some cases, additional labor or extra time is required to support the district's varying schedules. This exposes the district to required paid time or "sitting time" as a negotiated right in the classified bargaining unit contract. Sitting time is any period of an hour or less in length between assignments, and the district is contractually required to pay for these additional nondriving periods. The modified day schedules at five schools complicate this issue further because many of these sites have several grade levels with individual modified daily time dismissals. During a modified day schedule, altered pick-up times are paid as extra time in addition to the driver's regular assignment time. According to the transportation staff, all drivers except one participate in modified day schedules and receive one hour of sitting time under the contract stipulation. As a result, the complex modified day calendars for each school site require the district to pay for a substantial amount of unnecessary labor time.

The historical practice of sitting time has prompted situations that could allow for mid-day drivers to claim an hour of paid sitting time between their mid-day arrivals and their afternoon departures. Contractually limiting sitting time to 30 minutes or less would reduce the district's labor expense for bus drivers.

## Recommendations

*The district should:*

1. Study the financial impact of contractually limiting "sitting time" to 30 minutes or less for bus drivers.



## Vehicle Maintenance

Several vehicles in the district's school bus meet or exceed their service life cycle expectancy. The transportation program has a fleet of eight large buses and 19 smaller special education school buses for a total of 27 units. The average bus is 17 years old, 18 exceed their life expectancy, four meet their life expectancy and five are within five years of their life expectancy. The district has not replaced a school bus since 1999. The district's fleet list dated January 2006 indicates three units have logged more than 250,000 miles on their odometers and another 10 have logged more than 200,000 miles. The district's 2008 Annual Report of Pupil Transportation, or Form TRAN, shows that vehicles in the transportation program traveled a total of 188,007 miles, and the majority of those miles was accumulated by special education buses.

Santee recently decided to eliminate its district-supported fueling infrastructure because of mounting environmental requirements and the maintenance required to support in-ground fuel storage and pumping. The district contracted with a local vendor to purchase fuel from a nearby commercial facility. This included participation in the local municipality contract to ensure the district received a competitive rate and fuel tax exemption as a public entity.

The district should investigate the possibility of achieving further cost savings by contracting with a vendor for a service known as "wet-hosing." In this process, the vendor fuels vehicles at the transportation facility from a supply truck. Wet hosing is usually more costly than having fuel delivered and stored in underground tanks. However, when compared with the increased labor expense required to drive district vehicles to vendor's facility combined with the purchase cost, it may be competitive to implement wet hosing.

Santee is one of several elementary school districts that feed into a single high school district. The district may be able to contract with one of the larger transportation programs in neighboring districts for vehicle maintenance repairs at a cost that is substantially less than it pays to for-profit vendors. This possibility should be thoroughly investigated.

A review of records for 10% of the district's school bus fleet found that the transportation mechanic ensures all buses meet the Title 13 California Motor Carrier requirements regarding 45-day/3,000 safety inspections. The district has a well documented manual and preventative maintenance plan to address regularly scheduled preventative maintenance for all district vehicles. Although a manual vehicle history record is maintained, the district does not collect information on the labor time spent on individual vehicles. Further, the parts used to repair individual vehicles are not tracked. This data would allow the district to develop a full cost accounting, show the operational cost per mile of individual vehicles and produce a vehicle cost history. Outside repair expense could also be estimated, allowing the district to gauge the efficiency of vehicles as well as develop replacement parameters and recommendations.

Several retail software packages for vehicle maintenance would allow the district to determine the maintenance cost per vehicle, including parts, labor and fuel. This data would be extremely valuable in developing the budget, calculating the operational expense of each vehicle, and comparing the cost of operating older vehicles that need to be replaced with the cost of newer vehicles. The district has replaced its support fleet vehicles more consistently than its school buses. Immediate attention should be given to school bus replacement.

Staffing in the vehicle maintenance unit is critically low considering the number of vehicles serviced and repaired as well as the unit's operational hours. As part of several cost-cutting measures, the district planned to eliminate one half-time assistant mechanic position in March 2009. This would leave the maintenance unit with only one full-time mechanic to service and repair vehicles from 6 a.m. to 5 p.m. daily. No vehicle maintenance would be available during certain hours of the day, and no other mechanic would be available when the full-time mechanic was on vacation, ill or off work for other reasons. Older buses usually increase the number of outside repair accounts and the amount of time inoperative vehicles wait to be repaired. The district should re-evaluate its plan to reduce vehicle maintenance personnel by one half-time mechanic.

## Recommendations

*The district should:*

1. Determine whether any additional cost savings could be realized by contracting with a fuel provider to fill the district's fleet of vehicles on the premises as needed.
2. Contact the vehicle maintenance programs of neighboring school districts to discuss the possibility of entering into an outside repair contract to reduce outside repair expenses.
3. Evaluate the benefits of more effectively tracking and calculating vehicle maintenance repair and labor costs by using industry-standard vehicle maintenance software packages.
4. Re-evaluate the decision to reduce the vehicle mechanics staffing level by one half-time position so that only one full-time mechanic would be left to service and repair vehicles.

## Other Areas of Potential Savings

Two additional areas have a potential for cost reductions. The district has 48 two-way and mobile radios on the San Diego-Imperial Counties Regional Communications System (RCS). Because the district participates in the system as a customer and not a partner, it pays a higher rate than partner districts. Santee paid \$75.07 per radio, \$3,603.36 per month and \$43,240.32 per year for this service in 2007-08.

The system provides superior two-way radio communication coverage for the district's geographical area as well as San Diego and Imperial counties, allowing the district staff to maintain constant communication with the dispatch operation. Few alternatives offer the same coverage.

Cellular technology may offer a less-costly alternative, but the district would lose the ability to be in immediate two-way communication with most of the county's emergency first responders. In an emergency, when other lines of communication are interrupted, the RCS would be one of the first systems to be re-established because it is the county's official emergency response communications system, allowing interconnectivity between all public safety agencies. The district should attempt to renegotiate its status with the RCS from that of a customer to a full partner to reduce the per month radio charge to \$32.85. This would decrease the district's annual two-way radio communication expense from \$43,240.32 to \$18,921.60, a 57% savings.

Another potential area of cost reduction is the revenue lost from a decline in participation at the district's Project Safe after-school program. Many parents instead enroll their student(s) in the YMCA after-school program, which charges a substantially lower rate than the district program. There is a perception that Project Safe enrollment has decreased in part because the district provides parents with free transportation to the YMCA program through a paid contract between the two entities. However, this contract has helped the district generate more than \$50,000 in revenue to offset general education transportation encroachment for the 2007-08 budget cycle as documented on internal budget documents.

Further study is necessary to determine whether Project Safe's enrollment decrease is actually related to the issue of free transportation. Information gathered from students withdrawing from Project Safe confirms that a significant number left to join the YMCA program, but does not demonstrate they did so because of district-provided transportation. Because of the struggling national economy, families may transfer their children to the YMCA program because of the lower expense and not because of transportation issues.

## Recommendations

*The district should:*

1. Attempt to negotiate with the county's RCS agency to become a partner instead of a customer, reducing the annual expense by more than half and maintaining the high level of coverage and flexibility the RCS offers.
2. Survey parents to determine whether decreasing participation in the district's Project Safe program is caused by access to district-provided transportation to the YMCA's after-school program. The district should determine whether the revenues lost in Project Safe are greater than the revenues gained through the transportation contract with the YMCA.

## Communication Strategies for Reduction in Transportation Services

The state fiscal crisis is a compelling reason for districts to carefully analyze all operational costs, including transportation, and make reductions when feasible.

Reducing district transportation services will be complex and difficult. Parents will need to be informed of the changes and have a thorough understanding of the implications of any reductions proposed by the district. Providing the background and rationale for these decisions will also assist in the public's overall comprehension of the issue.

## Recommendations

*The district should:*

1. Provide information on plans to reduce transportation through community information meetings at regional locations in the district. This will provide parents with the opportunity to ask questions and address concerns and will give the district the opportunity to ensure that accurate information is provided.
2. Ensure all parents affected by transportation reductions receive notification of the change, the rationale and any options available regarding this issue.
3. Operate a hot line for approximately two months after the notification so that parents can call with questions or clarification. This number should also be posted on the district Web site and should provide direct access to someone briefed on the changes or reductions. Responsiveness is the key to the communication of these changes.





# Appendices

*A. Sample In-Lieu Contract*

*B. Site Maps with Nontransportation Zones*

*C. Study Agreement*



XXXX UNIFIED SCHOOL DISTRICT  
**TRANSPORTATION AGREEMENT**  
(For contracting with Parents or Guardians)

**THIS AGREEMENT** is entered into this \_\_\_\_\_ day of \_\_\_\_\_, between the XXXX Unified School District, hereinafter called the District, and \_\_\_\_\_, hereinafter called the Contractee for \_\_\_\_\_ hereinafter referred to as the Pupil.

**WITNESSETH:**

**WHEREAS**, the District has agreed to transport a student to \_\_\_\_\_ for special education and/or related services to the Pupil identified above, pursuant to Education Code Sections 56030-56040 or 56300-56367; and

**WHEREAS**, it has been determined that the Contractee will transport the Pupil to and from \_\_\_\_\_ during the 2008-2009 school year.

**NOW THEREFORE** the District and Contractee hereby agree as follows:

The District shall reimburse the Contractee for the transportation of the Pupil to and from the school the sum of \$ .55 per mile payable monthly upon presentation of an itemized mileage report to the District Special Education Executive Director. Payment shall be made as soon as possible in the month succeeding that in which the transportation was performed.

Total number of miles per week to be reimbursed **will not exceed** \_\_\_\_\_. It is expressly understood and agreed to by both parties that the Contractee, while performing services under the Agreement, is an independent contractee and is not an officer, agent, or employee of the District.

The Contractee shall defend, save harmless, and indemnify the District and its officers, agents, and employees from all liabilities and claims for damages for death, sickness, or injury to persons or property including without limitation all consequential damages, from any cause whatsoever arising from or connected with its service hereunder, whether or not resulting from the negligence of the Contractee, its agents or employees. Proof of automobile insurance shall be presented to the Special Education Executive Director prior to completing this contract.

Service under this Agreement shall **commence on** \_\_\_\_\_ and shall terminate on October 6, 2008 inclusive, unless terminated sooner when the District Transportation Department can provide transportation.

**IN WITNESS WHEREOF**, the parties hereto have executed this agreement as of the date and year first above written.

**XXXXX UNIFIED SCHOOL DISTRICT**

**CONTRACTEE**

By \_\_\_\_\_

By \_\_\_\_\_

Title Executive Director of Special Education

Title Parent

Date \_\_\_\_\_

Date \_\_\_\_\_

# Carlton Hills K - 8

Red Dots Kindergarten  
Red Pins Grades 1-3  
Black Pins Grades 4-6  
Blue Pins Grades 7-8

## TRANSPORTABLE ZONES

### CARLTON HILLS SCHOOL

Students living within 1 mile radius:

Kindergarten 42 out of 64 would not be eligible

Grades 1-3 99 out of 134 would not be eligible

Grades 4-6 131 out of 169 would not be eligible

Grades 7-8 145 out of 196 would not be eligible

Students living within 1.5 mile radius:

Kindergarten 50 out of 64 would not be eligible

Grades 1-3 106 out of 134 would not be eligible

Grades 4-6 142 out of 169 would not be eligible

Grades 7-8 173 out of 196 would not be eligible

Students living within 2 mile radius:

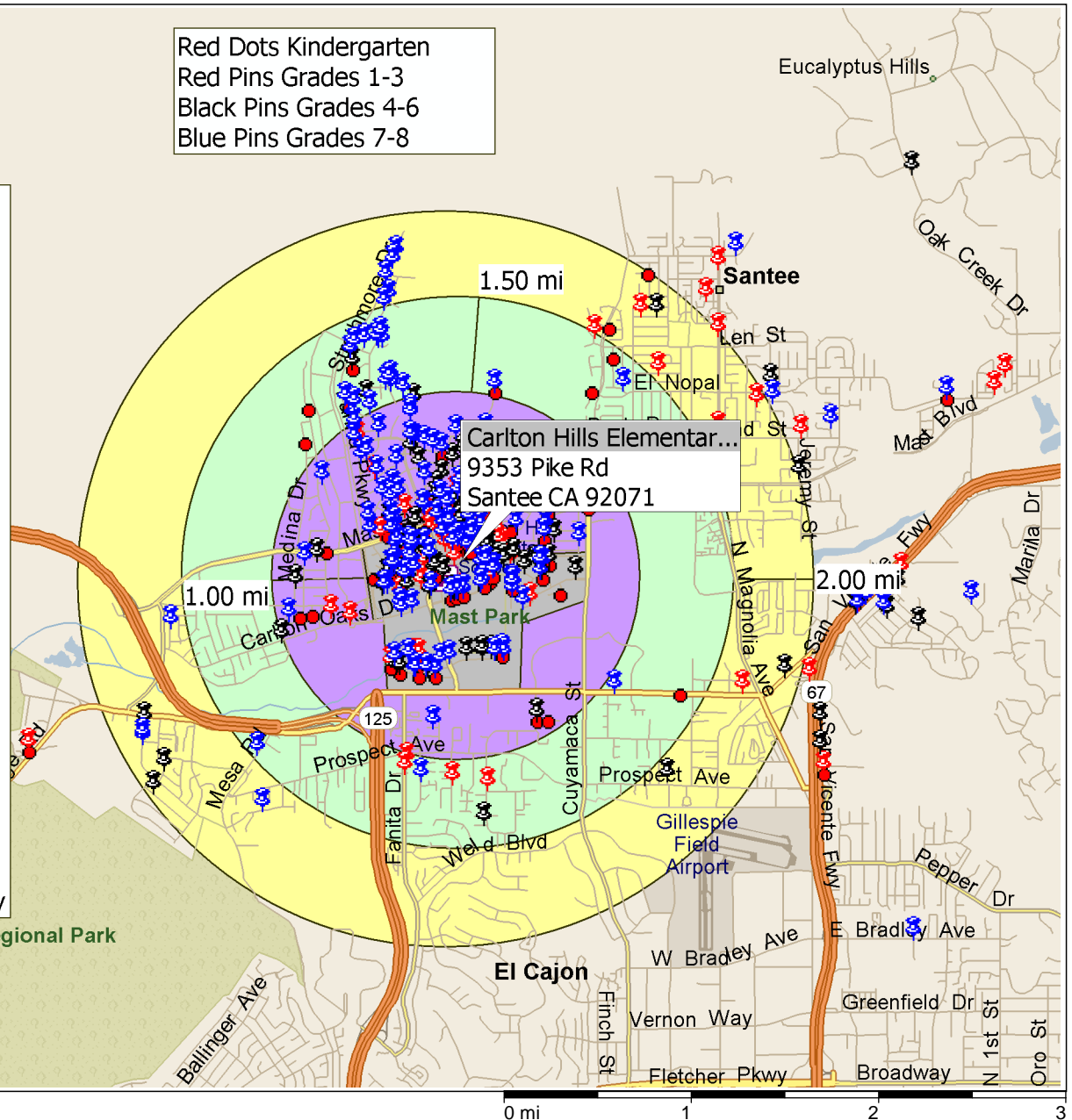
Kindergarten 54 out of 64 would not be eligible

Grades 1-3 121 out of 134 would not be eligible

Grades 4-6 149 out of 169 would not be eligible

Grades 7-8 183 out of 196 would not be eligible

Approximately 55 students live beyond the 2 mile radius which would also be outside the school boundary. School Boundary shown in Gray



# Chet F. Harritt K - 8

Red Dots Kindergarten  
Red Pins Grades 1-3  
Black Pins Grades 4-6  
Blue Pins Grades 7-8

## CHET F. HARRITT SCHOOL

Students living within 2 mile radius:

Kindergarten 68 out of 110 lose transp.  
Grades 1-3 123 out of 212 lose transp.  
Grades 4-6 176 out of 230 lose transp.  
Grades 7-8 74 out of 119 lose transp.

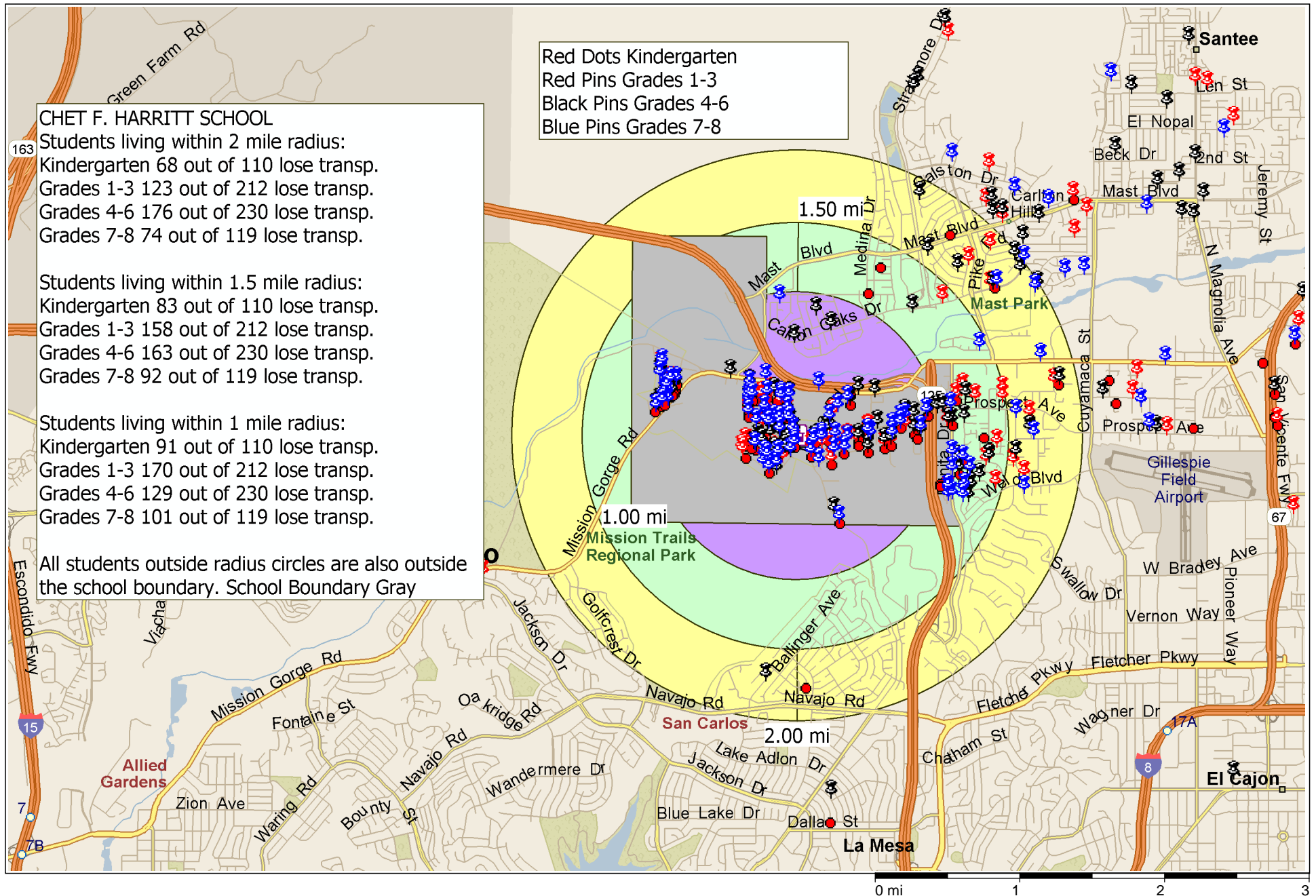
Students living within 1.5 mile radius:

Kindergarten 83 out of 110 lose transp.  
Grades 1-3 158 out of 212 lose transp.  
Grades 4-6 163 out of 230 lose transp.  
Grades 7-8 92 out of 119 lose transp.

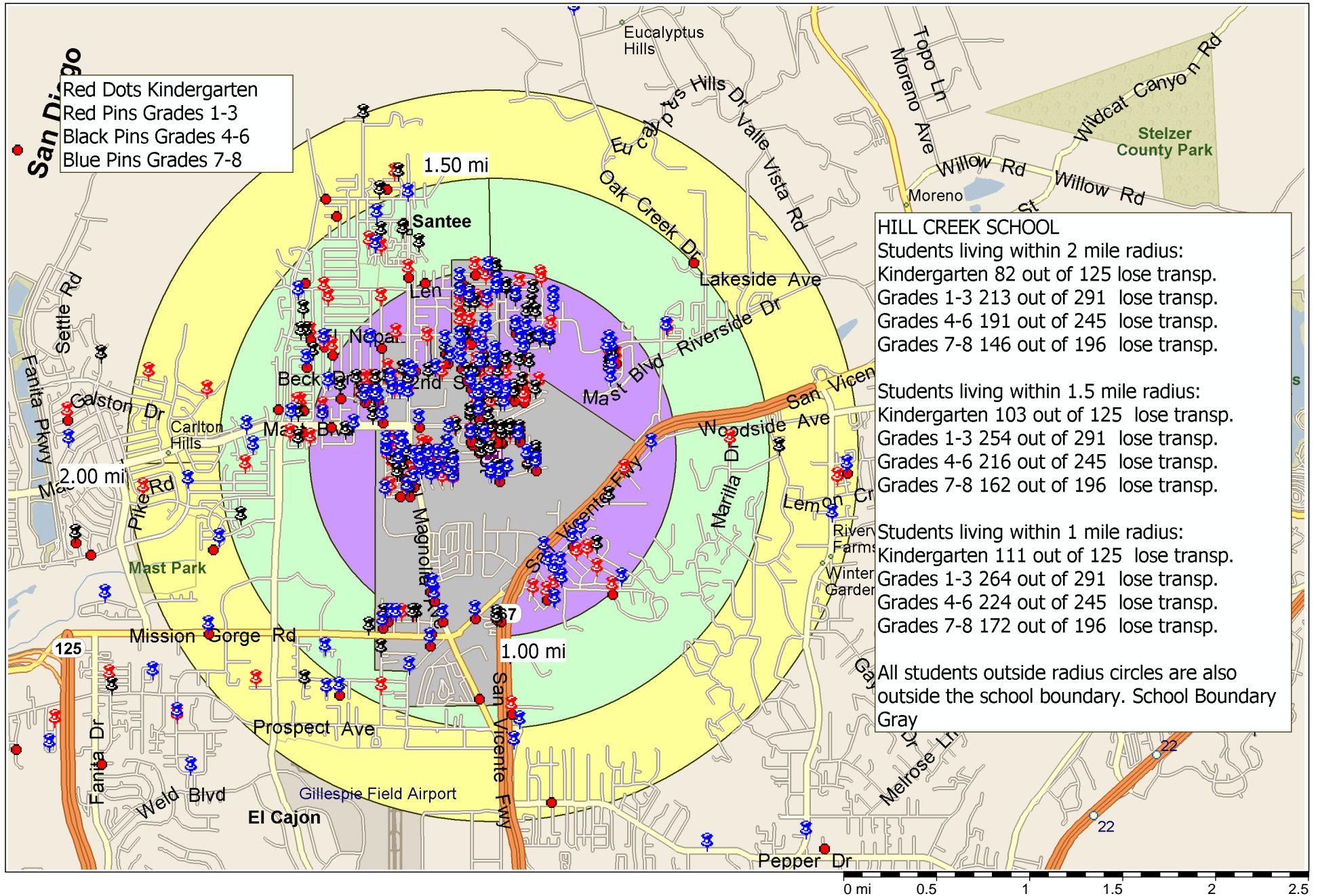
Students living within 1 mile radius:

Kindergarten 91 out of 110 lose transp.  
Grades 1-3 170 out of 212 lose transp.  
Grades 4-6 129 out of 230 lose transp.  
Grades 7-8 101 out of 119 lose transp.

All students outside radius circles are also outside the school boundary. School Boundary Gray

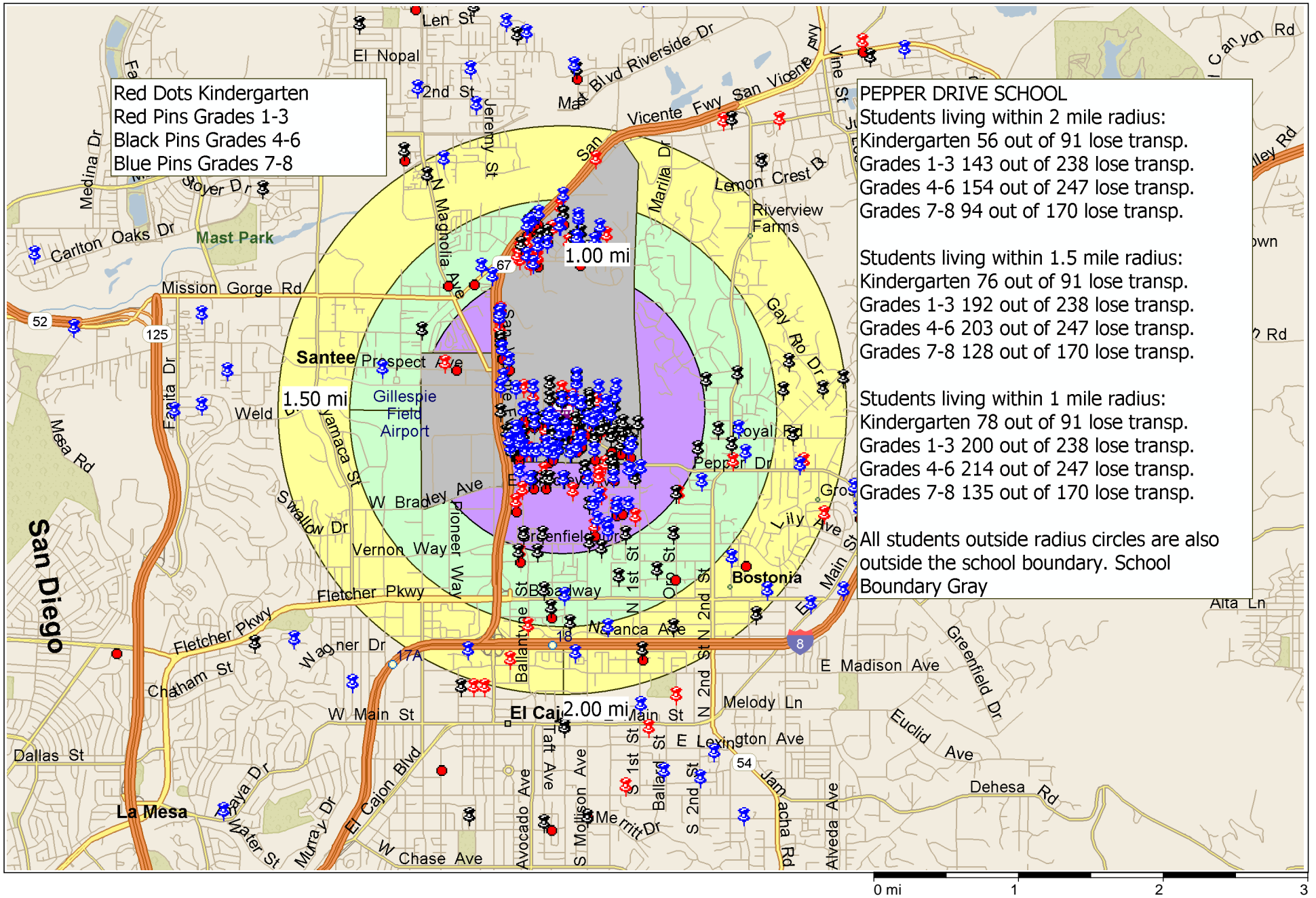


# Hill Creek K-8





# Pepper Driver k-8





# Prospect Avenue k-8

Red Dots Kindergarten  
Red Pins Grades 1-3  
Black Pins Grades 4-6  
Blue Pins Grades 7-8

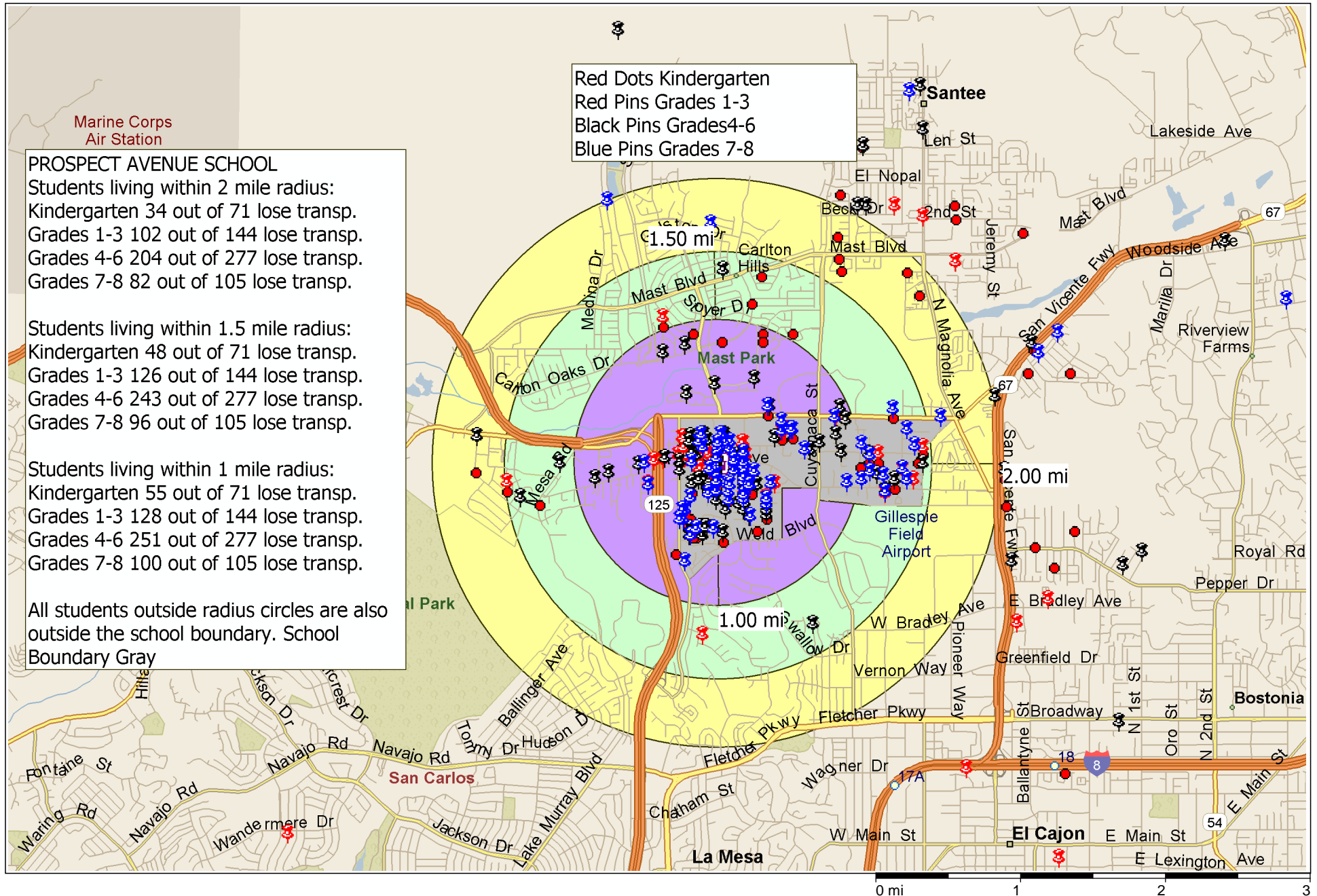
## PROSPECT AVENUE SCHOOL

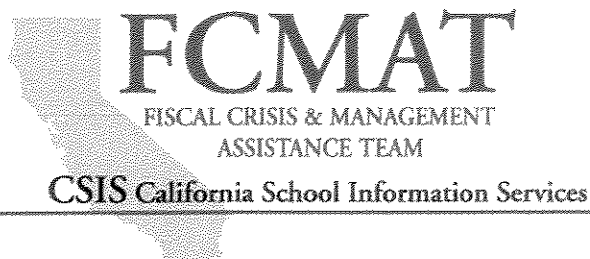
Students living within 2 mile radius:  
Kindergarten 34 out of 71 lose transp.  
Grades 1-3 102 out of 144 lose transp.  
Grades 4-6 204 out of 277 lose transp.  
Grades 7-8 82 out of 105 lose transp.

Students living within 1.5 mile radius:  
Kindergarten 48 out of 71 lose transp.  
Grades 1-3 126 out of 144 lose transp.  
Grades 4-6 243 out of 277 lose transp.  
Grades 7-8 96 out of 105 lose transp.

Students living within 1 mile radius:  
Kindergarten 55 out of 71 lose transp.  
Grades 1-3 128 out of 144 lose transp.  
Grades 4-6 251 out of 277 lose transp.  
Grades 7-8 100 out of 105 lose transp.

All students outside radius circles are also  
outside the school boundary. School  
Boundary Gray





FISCAL CRISIS & MANAGEMENT ASSISTANCE TEAM  
STUDY AGREEMENT  
November 21, 2008

The FISCAL CRISIS AND MANAGEMENT ASSISTANCE TEAM (FCMAT), hereinafter referred to as the Team, and the Santee 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 Santee School District operations. These professionals may include staff of the Team, County Offices of Education, the California State Department of Education, school districts, or private contractors. All work shall be performed in accordance with the terms and conditions of this Agreement.

2. SCOPE OF THE WORK

A. Scope and Objectives of the Study

The scope and objectives of this study are to:

- 1) Conduct a review of the District's Transportation program and operations.
- 2) Develop basic talking points for the District to use in communications with parents of regular and special education students during the process of identifying alternatives for transportation services, including parent transportation contracts.

- 3) Provide recommendations for a new bus routing methodology based on a standardized district wide school bell schedule and the most efficient use of transportation routes.
- 4) Review bus routes in areas considered unsafe and provide recommendations for changes to improve route safety. Provide an estimate of the cost to implement the recommendations and identify possible funding sources, including parent fees.
- 5) Analyze the fiscal impact of current bargaining contract provisions related to transportation including wait time, field trips, extra duty, additional benefits, other overtime and hourly activities.
- 6) Evaluate the current in-house bus maintenance activities and provide recommendations for cost savings and improvements.
- 7) Provide recommendations for communication strategies with parents and the community if the District considers reductions in transportation services.

B. Services and Products to be Provided

- 1) Orientation Meeting - The Team will conduct an orientation session at the District to brief District management and supervisory personnel on the procedures of the Team and on the purpose and schedule of the study.
- 2) On-site Review - The Team will conduct an on-site review at the District office and at school sites if necessary.
- 3) Progress Reports - The Team will hold an exit meeting at the conclusion of the on-site review to inform the District of significant findings and recommendations to that point.
- 4) Exit Letter - The Team will issue an exit letter approximately 10 days after the exit meeting detailing significant findings and recommendations to date and memorializing the topics discussed in the exit meeting.
- 5) Draft Reports - Sufficient copies of a preliminary draft report will be delivered to the District administration for review and comment.
- 6) Final Report - Sufficient copies of the final study report will be delivered to the District following completion of the review.
- 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 costs. 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, Deputy Executive Officer, Fiscal Crisis and Management Assistance Team, Kern County Superintendent of Schools Office. The study team may also include:

- A. Dr. Bill Gillaspie, FCMAT Chief Management Analyst
- B. FCMAT Special Education Consultant
- C. Three FCMAT Transportation Consultants

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

4. PROJECT COSTS

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

- A. \$500.00 per day for each Team Member while on site, conducting fieldwork at other locations, preparing and presenting reports, or participating in meetings.
- B. All out-of-pocket expenses, including travel, meals, lodging, etc. Based on the elements noted in section 2 A, the total cost of the study is estimated at **\$15,000**. The District will be invoiced at actual costs, with 50% of the estimated cost due following the completion of the on-site review and the remaining amount due upon acceptance of the final report by the District

C. *Any change to the scope will affect the 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 organizational charts
  - 4) Current and four (4) prior year's audit reports
  - 5) Any documents requested on a supplemental listing

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

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

6. PROJECT SCHEDULE

The following schedule outlines the planned completion dates for key study milestones, *contingent on board approval and availability of FCMAT Staff and consultants:*

<b><i>Orientation:</i></b>	<b><i>Estimated in February, 2009</i></b>
<b><i>Staff Interviews:</i></b>	<b><i>Conducted over a three day period</i></b>
<b><i>Exit Interviews:</i></b>	<b><i>Conducted on third day</i></b>
<b><i>Preliminary Report Submitted:</i></b>	<b><i>Six weeks after the exit meeting</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

Please print name of contact person: Bill Clark, Assistant Superintendent

Telephone 619 258-2304 FAX

Internet Address ljohnson@santee.k12.ca.us

*Lisbeth A. Johnson*

*12/16/08*

Dr. Lis Johnson, Superintendent  
Santee School District

Date

*Barbara Dean*

November 25, 2008

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

Date

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.