FCMAT
FISCAL CRISIS & MANAGEMENT ASSISTANCE TEAM
CSIS California School Information Services

Coalinga-Huron Joint Unified School District

Maintenance, Operations, Grounds and Transportation Review

March 19, 2018

Michael H. Fine
Chief Executive Officer

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Ms. Lori Villanueva, Superintendent
Coalinga-Huron Joint Unified School District
657 Sunset Street
Coalinga, CA 93210-2927

Dear Superintendent Villanueva:

In October 2017, the Coalinga-Huron Joint Unified School District entered into an agreement with the Fiscal Crisis and Management Assistance Team (FCMAT) for a study to perform the following:

1. Conduct an organizational and staffing review of the following departments and make recommendations for staffing improvements or reductions, if any:
   a. Maintenance and Operations (including grounds and custodial)
   b. Transportation (including special education transportation)
2. Evaluate the current workflow and distribution of functions in each of the above departments and make recommendations for improved efficiency, if any.
3. Review the operational processes and procedures for each of the above departments and make recommendations for improved efficiency, if any.

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

Sincerely,

Michael H. Fine
Chief Executive Officer

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About FCMAT

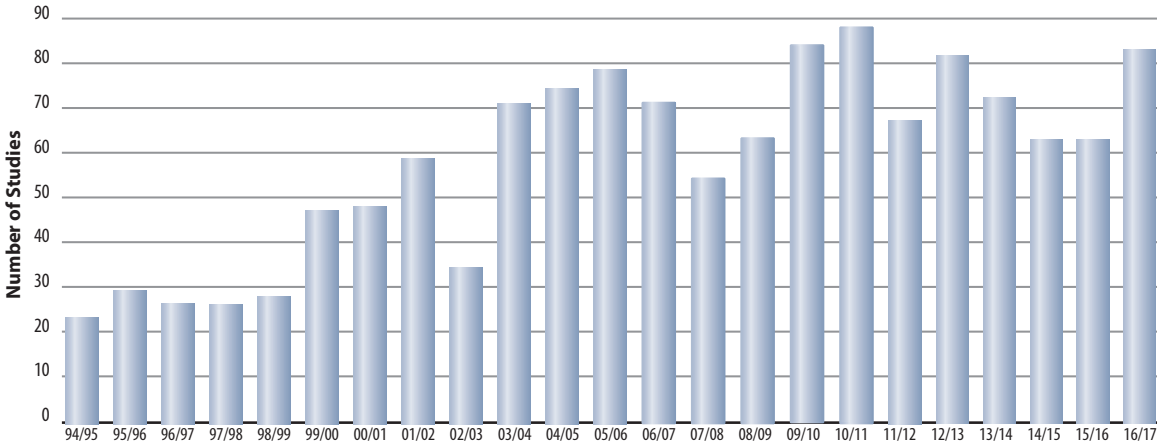
FCMAT's primary mission is to assist California's local K-14 educational agencies to identify, prevent, and resolve financial, human resources and data management challenges. FCMAT provides fiscal and data management assistance, professional development training, product development and other related 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, support the training and development of chief business officials and help to create efficient organizational operations. FCMAT's data management services are used to help local educational agencies (LEAs) meet state reporting responsibilities, improve data quality, and inform instructional program decisions.

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 LEA 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.

FCMAT has continued to make adjustments in the types of support provided based on the changing dynamics of K-14 LEAs and the implementation of major educational reforms.

Studies by Fiscal Year



FCMAT also develops and provides numerous publications, software tools, workshops and professional development opportunities to help LEAs operate more effectively and fulfill their fiscal oversight and data management responsibilities. The California School Information Services (CSIS) division of FCMAT assists the California Department of Education with the implementation of the California Longitudinal Pupil Achievement Data System (CALPADS). CSIS also hosts and maintains the Ed-Data website (www.ed-data.org) and provides technical expertise to the Ed-Data partnership: the California Department of Education, EdSource and FCMAT.

FCMAT was created by Assembly Bill (AB) 1200 in 1992 to assist LEAs to meet and sustain their financial obligations. AB 107 in 1997 charged FCMAT with responsibility for CSIS and its statewide data management work. AB 1115 in 1999 codified CSIS' mission.

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

In January 2006, Senate Bill 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 more than 1,000 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 Michael H. Fine, 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 Coalinga-Huron Joint Unified School District's student attendance boundaries encompass southwest Fresno County and portions of San Benito and Monterey counties. The district serves approximately 4,400 students in Coalinga, Huron and the surrounding rural areas at four elementary schools, two middle schools, a comprehensive high school, two continuation high schools and a community day school. Three of the elementary schools and one of the middle schools are in Coalinga; one elementary school and one middle school are in Huron. There is one comprehensive high school in Coalinga and there are continuation high schools in Coalinga and Huron. Interstate 5 bisects the district.

In conducting this study, FCMAT interviewed representative district, department, and site staff; reviewed policies and procedures; and examined a sampling of district documents. To provide a more succinct report, the findings and recommendations are predominately of a deficit nature, meaning that items of concern are reviewed and reported, but appropriate, reasonable, and correct business practices are normally excluded.

Study and Report Guidelines

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

- Executive Summary
- Custodial
- Maintenance and Grounds
- Transportation
- Appendices

FCMAT's reports focus on systems and processes that may need improvement. Those that may be functioning well are generally not commented on in FCMAT's reports. In writing its reports, FCMAT uses the Associated Press Stylebook, a comprehensive guide to usage and accepted style that emphasizes conciseness and clarity. In addition, this guide emphasizes plain language, discourages the use of jargon and capitalizes relatively few terms.

Study Team

The study team was composed of the following members:

Eric D. Smith, MPA
FCMAT Intervention Specialist
Templeton, CA

Chris Johnston*
Assistant Superintendent, Business Services
Pleasant Valley School District
Camarillo, CA

Michael G. Rea
FCMAT Consultant
Santa Rosa, CA

Laura Haywood
FCMAT Technical Writer
Bakersfield, CA

*As a member of this study team, this consultant was not representing his respective employer, but was working solely as an independent contractor for FCMAT. Each team member reviewed the draft report to confirm its accuracy and to achieve consensus on the final recommendations.

Executive Summary

Many custodial staff members have been employed in the district for several years. However, their experience has not been translated into written procedures, causing the district to rely solely on employees to know how to carry out their duties and responsibilities, which is ineffective and inefficient. Without policies, procedures and standardization, expectations of cleanliness are not uniform and there are varying degrees of cleanliness across the district. The lack of procedures has also created inefficiencies when new employees are hired or when substitute employees are used because both new and substitute employees are left to learn their responsibilities on the job with no formal training.

Field observations indicate the level of cleaning in the district is generally at U.S. Department of Education level 2, with areas of high concern receiving daily attention and the general classroom areas cleaned every day. However, interviews with custodial staff indicate there is no district standard for cleanliness, and schedules (i.e., the specific tasks performed by each custodian) are informal and vary from site to site. The district needs to develop and formally adopt written cleaning standards and expectations for custodial work. The standards should include daily, weekly and monthly duties and should be developed with the participation of senior management and be approved by the school board.

The maintenance department uses a paper-based work order system with limited ability to document, track, or provide status updates on work orders. According to the documentation provided by the department to FCMAT, work orders are received via "fax, email, inter district (sic) mail, by phone, and verbal (sic) by staff." Once received, the coordinator assigns a work order to a trade, not an individual, and then places the work orders on a table where line staff pick them up. After completing the work orders line staff hand them in to one of the department administrative assistants. The administrative assistant then files the work orders. There are no duplicate copies of paper work orders and no paper matching system in place to ensure completion. The school sites receive a Friday update, in which all of the completed work orders are listed. Some school site staff dispute the accuracy of the Friday update, stating that incomplete work orders have been included as completed work. The nature of this paper-based work order system precludes verifying or disputing this claim, showing the weakness of the system in tracking or communicating work order status to end users.

The district was unable to provide any documentation of a preventative maintenance program. Interviews revealed, however, that maintenance staff are completing preventative maintenance work. The type of preventative maintenance work completed and the frequency of work are left entirely up to the expertise and willingness of the maintenance staff member under whose purview the work falls. There is no formal documentation of the work being completed, although diligent staff members do keep their own notes. This completely informal preventative maintenance structure has the inherent weakness that critical preventative maintenance tasks will be missed if a key employee leaves the organization or is out sick during the time period when the task needs to be completed.

A preventative maintenance program is standard practice for California school districts. The most common way to execute this is a systematic evaluation of building systems and system components, including roof systems, wall systems, HVAC systems, refrigeration equipment, electrical systems, gas lines, plumbing distribution and waste, and fire alarm systems. A preventative maintenance program that is integrated into automated work order software would generate the preventative maintenance work orders on a set schedule, and track the completion of the work.

The district receives only $428,093 to cover transportation expenses of over $1.6 million. Under the Local Control Funding Formula (LCFF), the fund has not received a Cost of Living Adjustment (COLA), is restricted to transportation use and is subject to maintenance of effort (MOE), meaning the district must spend at least as much as it receives on transportation.

Vehicle maintenance labor and parts for vehicles used for the maintenance and grounds department and school vans are charged to home-to-school transportation. All district fuel also is charged to home-to-school transportation. This practice inflates the district's home-to-school transportation costs. These costs should be separated out and charged appropriately. A daily shuttle bus to and from Coalinga High School and the school farm is charged as home-to-school transportation. This should be charged as a field trip. The use of vans for small student groups is charged to the groups at a rate of $1.38 per mile. No data supports this rate. The district needs to determine its costs to operate these vehicles and set an accurate rate. The field trip rate charged to groups for school bus transportation was set several years ago and includes a per-mile charge of $4.07 and $36.08 for any hours that a bus driver is in overtime status. This rate appears to be arbitrarily set and may not accurately reflect the actual share of operating field trip transportation. The district's field trip approval process is cumbersome and trips often are not approved before they occur.

The district does not charge fees for home-to-school transportation, and with approximately 81% of the district's students qualifying for free or reduced-price lunches, charging fees is not practical. All of the drivers have an 8-hour-per-day contract and are responsible for other, non-bus driving duties in addition to bus route time. The salary amounts associated with work for other departments should be charged to the grounds, maintenance or custodial departments. The transportation department purchases tires from a local vendor and should ensure it receives state bid pricing for all tire purchases. The district is incorrectly being charged state excise tax for diesel fuel purchases.

Findings and Recommendations

Custodial

The district's custodial staff is dedicated to ensuring that school facilities are clean for staff and students. Many of the custodians have several years with the district and excel at their job despite having little formal training. Most of the custodial staff arrive at 2:30 p.m. and work to 10 or 11 p.m. Maintenance or grounds staff are responsible for unlocking gates and opening schools in the morning. Custodians work in teams of three to five members to perform deep cleaning during summer vacation.

Supervision and Training

Although many custodial staff members have been employed in the district for several years, their experience has not been translated into written procedures, causing the district to rely solely on employees to know how to carry out their duties and responsibilities. This is ineffective and inefficient. Without policies, procedures and standardization, expectations of cleanliness are not uniform and there are varying degrees of cleanliness across the district. The lack of procedures has also created inefficiencies when new employees are hired or when substitute employees are used because both new and substitute employees are left to learn their responsibilities on the job with no formal training.

The district has a custodial supervisor, although very little of the supervisor's time is committed to training. The supervisor is responsible for managing the district's custodial warehouse and providing custodians the supplies they need to perform their jobs. However, FCMAT observed that the supervisor has no control of the custodial budget. To implement a best practice professional development program for district custodians, the custodial supervisor needs to have control and be held accountable for the district's custodial budget.

The custodial supervisor is responsible for supervising and evaluating all custodians. The collective bargaining agreement for classified employees indicates that classified employees are to be evaluated yearly. Most custodians indicated they are evaluated annually, although one custodian indicated she had not been evaluated in four years. FCMAT also noted that the probationary period for new classified employees is "130 working days of active duty status effective from the bargaining unit member's initial hire date" according to the collective bargaining agreement. A six-month probationary period may not be long enough for management to adequately assess whether a new employee possesses the requisite skills, attitude, abilities and work ethic to perform successfully in a new job. The district should negotiate a probationary period of at least one year for all new classified employees, including custodians.

The custodial supervisor indicated that he responds to all emergencies, such as tripped alarms, fires, break-ins, etc., at all schools at all times. Section 6.11 of the classified employees collective bargaining agreement, Call Back Time, indicates that "Any employee called back to work after the completion of his/her regular assignment shall be compensated for at least two (2) hours of work at the appropriate rate of pay, irrespective of the actual time less than that required to be worked." Custodians indicated that they could volunteer to be put on a list for call back time; however, most choose not to. Since classified employees are paid to respond to tripped alarms, fire, break-ins, etc., then the district may want to consider whether it is the most cost effective use of the custodial supervisor's time to respond to each emergency.

The district employs a safety officer who has been proactive in conducting safety training. However, this training does not include subject matter specific to custodial operations. It consists of general safety training, but no specific training on cleaning. The district could increase efficiency in the department by ensuring that routine meetings include discussion of industry best practices, proper chemical use, chemical mixing, and equipment use. A meaningful professional development plan would improve knowledge and hone skills. Consistent professional development can also help increase and maintain staff morale.

Because the district has no training program for substitute employees, these employees are unprepared. In at least one instance, a substitute custodian was injured due to insufficient training on the use of an automatic floor scrubber. Moreover, the district has a critical shortage of substitute custodians. Creating a substitute employee training program would benefit the district by establishing a pool of trained substitute custodians. The custodial supervisor could provide this training using a curriculum that includes chemical use and mixing, required daily tasks, and expectations regarding professionalism, attendance and interactions with students and staff.

Recommendations

The district should:

1. Establish a written uniform standard of cleanliness across the district and distribute it to all custodians.
2. Implement regular professional development for custodians, including proper use of chemicals, chemical mixing, use of equipment and other industry best practices.
3. Establish an orientation for new permanent and substitute custodians, including but not limited to training on the proper use of custodial equipment, mixing of chemicals and materials and supplies.
4. Grant the custodial supervisor control and hold him accountable for the district's custodial budget.
5. Negotiate a probationary period of at least one year for all new employees, including custodians.
6. Consider whether it is the most cost effective use of the custodial supervisor's time to respond to all emergencies.

Equipment, Supplies and Tools

During FCMAT's fieldwork, district custodians reported that they have no difficulty requisitioning supplies and that the delivery of supplies is timely. The study team noted that although most custodians wear rubber gloves, other safety equipment, such as goggles and respirators, are not worn when custodians mix chemicals nor are they made available. Each custodian should have the necessary safety equipment to perform the job safely.

District custodians acknowledged that most of their equipment, such as vacuums and auto scrubbers, are in good repair. However, some custodians expressed frustration with a new line

of vacuums that are prone to clogging and overheat easily. At least one custodian indicated the district had a demonstrable need for a water pick-up vacuum to remove excess water on classroom floors. The loss of productivity resulting from down time due to the current model of vacuum cleaner may warrant looking for a different model with a better maintenance record.

FCMAT reviewed the job description for district custodians. The custodian job description states that the custodian should be able to "make minor, non-technical repairs as needed, such as replacing light bulbs and lighting tubes" and "operate custodial equipment such as vacuums, mops, small hand and power tools." However, custodians reported that the district has not furnished them with hand tools, and in some instances, custodians make repairs using their personal tools.

Recommendations

The district should:

1. Ensure that all custodians, including new and substitute custodians, are provided with necessary safety equipment, including rubber gloves, goggles and respirators.
2. Review whether the downtime associated with vacuums warrants changing vacuum models.
3. Provide each school site a set of small hand tools to be secured in a locked custodial closet.
4. Ensure that the custodial supervisor conducts a yearly inventory of the hand tools at each school site.

Custodial Standards

Although there are no nationwide standards of cleanliness, the U.S. Department of Education has established five levels of cleaning, including how many square feet can reasonably be expected to be completed at each level by a building custodian working an eight-hour shift.

Level 1 cleaning results in a "spotless" and germ-free facility as might normally be found in a hospital or corporate suite. At this level, a custodian with proper supplies and tools can clean approximately 10,000 to 11,000 square feet in eight hours.

Level 2 cleaning is the uppermost standard for most school cleaning and is generally reserved for restrooms, special education areas, kindergarten areas, or food service areas. This service level includes vacuuming or mopping floors daily, and sanitizing all surfaces. A custodian can clean approximately 18,000 to 20,000 square feet in an eight-hour shift at this level.

Level 3 cleaning is the norm for most school facilities. It is acceptable to most interested parties and does not pose any health issues. Classrooms are cleaned daily, which includes dumping trash and cleaning common area surfaces such as sinks and door handles. Carpets are vacuumed and surfaces used by students are sanitized every other day. A custodian can clean approximately 28,000 to 31,000 square feet in eight hours at this level.

Level 4 cleaning is not normally acceptable in a school environment. Classrooms are cleaned every other day, carpets vacuumed every third day, and dusting done once a month. A custodian can clean 45,000 to 50,000 square feet in eight hours at this level.

Level 5 cleaning can very rapidly lead to an unhealthy situation. Trash cans may be emptied and carpets vacuumed only weekly. One custodian can clean 85,000 to 90,000 square feet in eight hours at this level.

The figures above are estimates. The actual number of square feet per shift that can be cleaned by a custodian will also depend on variables such as the type of facilities, flooring, wall covers, number of windows, restroom layouts, gym and athletic facilities, and offices. Nevertheless, a review of the district's custodial runs reflects a significant variance in the building footage assigned to a custodian, from a low of 11,480 at one site to a high of 41,919 at another. Some runs include labor-intensive tasks, such as multiple sets of restrooms, whereas others consist almost entirely of classrooms, with perhaps one set of restrooms.

Field observations indicate that cleaning in the district is generally at level 2, with areas of high concern receiving daily attention and the general classroom areas cleaned every day. However, interviews with custodial staff indicate there is no district standard for cleanliness, and the specific tasks performed by each custodian vary from site to site.

Written cleaning standards and expectations would better define custodial work. The standards would include daily, weekly and monthly duties and would be developed with the participation of senior management and approval by the school board. It is best to develop these standards before creating work schedules so that the schedules can include adequate time to complete the tasks required. To develop meaningful standards, planners, administrators and community members need to agree on what constitutes an acceptable level of cleanliness.

Many school districts have found it useful to memorialize cleanliness standards; protocols for interactions with staff, students and the public; safety, cleaning methods, schedules and training in a custodial handbook. The custodial handbook serves as a reference guide for both permanent and substitute custodians. The district's custodial supervisor could create the custodial handbook and train custodial staff on its use. A sample custodial handbook is attached as Appendix A.

Recommendations

The district should:

1. Develop and formally adopt written cleaning standards and expectations for custodial work, including daily, weekly and monthly duties.
2. Establish standards before creating work schedules so that the schedules can include adequate time to complete the tasks required.
3. Direct the custodial supervisor to prepare a custodial handbook that lays out the district's expectations in the areas listed above.
4. Train custodial staff on the information contained in the custodial handbook.
5. Review each custodial run using the level 2 standard to ensure that workloads are evenly distributed among custodial staff.

Custodial Staffing

The California Association of School Business Officials (CASBO) custodial staffing formula considers the square footage of sites and the number of students, staff, classrooms, offices and general purpose areas. The formula does not include administrative facilities or after-school programs, but it serves as a starting point for staffing the cleaning of classrooms to a level 2 standard. Special education classrooms are included. The formula is as follows:

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

The result is divided by four to indicate the number of custodians needed to clean and maintain a building. Additional staffing is allocated for community use of facilities and for schools with fewer than 400 students. This formula is based on industry standards and has been widely used to analyze custodial staffing levels in schools throughout California. The CASBO recommendation for staffing is based on level 2 cleaning as identified by the U.S. Department of Education. Based on the district's information, the chart below compares the district's staffing to that of the CASBO standard. Depending on individual site characteristics such as underused classrooms or extra campus facilities, the total square footage ratio can skew the analysis.

The following chart applies the CASBO custodial staffing formula to each of the district's school sites and compares the resulting recommended staffing data with the actual custodial time the district has assigned. Because the district allocates a percentage of full time equivalents (FTEs) across multiple school sites, it was not possible to get an exact comparison of the number of custodians recommended under the CASBO formula versus the number of custodians the district has assigned on a site-by-site basis. Rather, FCMAT was able to arrive at the number of FTEs recommended districtwide using the CASBO formula.

Schools	Bldg. S/F	# Rooms	# Students	# Teaching Staff	Teachers / 13 plus	Enrollment/ 325 plus	Classrooms/ 13 plus	Square Footage/18,000 plus	Total divided by four plus	Community Usage @ .06 FTE	Plus .30 FTE LT 400	Total Custodians Needed
Cheney	12,700	7	144	6.00	0.461538462	0.44307692	0.538461538	1	0.53715812	0.0625	0.3	1
Bishop	31,439	17	343	26.00	2	1.05538462	1.307692308	1.746611111	1.527422009	0.0625	0.3	1.589922009
Dawson	48,056	25	419	22.00	1.692307692	1.28923077	1.923076923	2.669777778	1.893598291	0.0625		1.956098291
Sunset	50,596	17	446	22.00	1.692307692	1.37230769	1.307692308	2.810888889	1.795799145	0.0625		1.858299145
CHS	264,009	72	1129	60.75	4.673076923	3.47384615	5.538461538	14.66716667	7.088137821	0.0625		7.150637821
CMS	66,486	35	639	35.00	2.692307692	1.96615385	2.692307692	3.693666667	2.761108974	0.0625		2.823608974
Huron Elm	88,256	45	845	49.00	3.769230769	2.6	3.461538462	4.903111111	3.683470085	0.0625		3.745970085
Huron Middle	50,599	22	378	19.00	1.461538462	1.16307692	1.692307692	2.811055556	1.781994658	0.0625	0.3	1.844494658
Cambridge	3,360	5	52	6.26	0.481538462	0.16	0.384615385	0.186666667	0.303205128	0.0625	0.3	0.665705128
Chestnut	3,360	1	2	1.00	0.076923077	0.00615385	0.076923077	0.186666667	0.086666667	0.0625	0.3	0.449166667
Miles Culwell	960	1	1	1.00	0.076923077	0.00307692	0.076923077	0.053333333	0.052564103	0.0625	0.3	0.415064103
											CASBO Formula	23
											District's current staffing	26
											Difference	-3

The district has a total of 26 FTE positions. The CASBO ratios indicate it needs 23, meaning the district is overstaffed by 3.0 FTEs. However, the district employs two rover custodial positions, who are partially assigned to cleaning the exterior of the district's school sites. These positions are unique to the district and in other school districts could be considered groundskeepers.

Recommendations

The district should:

1. Use the CASBO custodial formula as a starting point to arrive at an adequate number of custodians for each school site.
2. Modify the CASBO custodial formula to contemplate the impact of child care and administrative facilities.
3. Annually monitor changes in student enrollment, classroom use, number of teachers and building square footage at each school, and use this information to adjust custodial staffing using the modified CASBO formula.

Maintenance and Grounds

Department Overview

The director of facilities, maintenance, operations, and transportation (FMOT) has led the maintenance department for 15 years. The coordinator of maintenance and operations (M&O) reports to the director of FMOT and has served in this role since 2007. Line staffing consists of 10 grounds staff and 13 maintenance staff. Per the organizational chart, maintenance staff are subdivided into two categories: maintenance and specialty. The job description for maintenance staff members includes general maintenance duties. Job classifications for the specialty staff include these areas: aquatic facilities operator; plumber; hazmat/safety/painter; heating, ventilation, air conditioning and refrigeration technicians (two positions); locksmith/welder; warehouse/delivery driver; and electrician. Two administrative assistants staff the M&O office.

According to the organizational chart, and as was reported by district staff during FCMAT's fieldwork, general maintenance staff report directly to the coordinator of M&O. Specialty maintenance staff, however, report to both the coordinator and the director. During fieldwork, specialty maintenance staff were inconsistent in describing what areas of authority each leader has. Some specialty maintenance staff reported bypassing the coordinator entirely. Lack of clear areas of authority and lack of role clarity inherently contribute to inefficiency. At a minimum, if the district chooses to maintain dual supervision of specialty maintenance staff, staff members need to have the lines of authority clarified. Later in this report an alternative department leadership structure is proposed that deletes the redundancy of dual supervision.

When specialty maintenance staff were questioned about why they report to the director instead of the coordinator, the consensus answer provided to FCMAT was that the coordinator does not possess the technical expertise necessary to support them. The role of a department leader is to build the capacity of staff to learn, work, and make routine decisions independently. It is not to serve as the sole repository of technical and trade knowledge. The latter method of leadership leads to inefficiencies and dependence on a single individual instead of on procedures and systems. The former style of leadership results in staff working efficiently, with clear expectations and guidelines. This results in increased employee empowerment and engagement, which will yield better team outcomes. The maintenance department must remember its role within the organization: supporting student achievement through properly maintained schools. This may involve reporting to nontechnical staff whose expertise is in education.

Furthermore, the range of technical knowledge within the specialty classifications - from pool chemistry to HVAC, to electrical systems and master keying - is generally beyond the expertise of a single individual. Supervising and leading technical staff does not require technical mastery of each individual trade. Instead, it involves a high-level understanding of the trades and building systems, and strong organizational skills. A general lack of departmental documentation and organizational systems may have impeded the ability of the coordinator to lead, resulting in an overreliance by staff on the technical knowledge of the director. Providing training opportunities could fill in any gaps in the high-level technical knowledge of the coordinator.

While it is clear that the general maintenance staff report to the coordinator, staff members are unclear about which tasks are the responsibility of general maintenance staff. While general maintenance positions often become a catchall for basic maintenance tasks, the degree to which general maintenance staff seem to have been relegated to the role of helpers is unusual. Whereas specialty maintenance staff expressed a high level of job satisfaction and feeling of impact on the

organization, general maintenance staff demonstrated low levels of engagement and were unable to express a sense of purpose. Clearly articulating the role and importance of general maintenance staff could improve employee engagement and work outcomes.

FCMAT found that general maintenance staff appear to perform the painting duties. Drywall repair and general remodeling projects were also described as part of their duties. Specialty maintenance staff reported that general maintenance staff are available as helpers when they need an extra pair of hands. Turning these helper jobs into training opportunities would increase the capacity of general maintenance staff. School site staff reported that general maintenance staff are responsible for setting up facilities for meetings and for opening and closing gates. This is reflected in the job description. Whether or not this is an efficient use of staff time will be addressed later in this report.

Maintenance Work Order System

The maintenance department uses a paper-based work order system with limited ability to document, track, or provide status updates on work orders. According to the documentation provided by the department to FCMAT, work orders are received via "fax, email, inter district (sic) mail, by phone, and verbal (sic) by staff." Once received, the coordinator assigns a work order to a trade, not an individual, and then places the work orders on a table for staff to pick up. Staff hand in completed work orders to one of the department administrative assistants, who then file them. There are no duplicate copies of paper work orders and no paper matching system in place to ensure completion. School sites receive a Friday update in which all of the completed work orders are listed. Some school site staff dispute the accuracy of the Friday update, stating that incomplete work orders have been included as completed. The nature of this paper-based work order system precludes verifying or disputing this claim, showing the weakness of the system in tracking or communicating work order status to end users.

The problems associated with this work order system are many, including the inability to track work orders or provide FCMAT staff with even an estimate of the number of backlogged work orders. Tracking of work order data in a form that is accessible to multiple users is a basic requirement of a maintenance department. Human error is inevitable, and the risk of losing a piece of paper with an important work order on it is a concern. When questioned about this risk, department staff recognized that the memory of the coordinator is the only safety net against lost work orders. Essentially, aside from subjective views of employee productivity, the existing work order system precludes tracking of data to prove or disprove department effectiveness.

Another negative consequence of the lack of work order tracking is the inability to track employee productivity, repair trends, costs, or work backlog.

The work order system lacks a feedback loop to end users, who receive no communication as to whether the work order has been assigned, when it might be addressed, or when it is completed. There is no guarantee for end users that the work will be completed. The maintenance department has no accountability to the end user for completing work in a timely manner. Users receive no status updates unless they call the maintenance office to track down the person holding the work order.

School site staff shared an example that summarized the deficiencies of this system. A work order for a roof leak was submitted in the spring, before school let out. Upon returning from summer break, staff found what appeared to be mold at the site of the leak. The work order system has no

ability to determine how this failure occurred. Did the tradesperson lose the work order? Was it ever assigned? Was work completed, but not properly? When was the work completed?

In contrast, a web-based work order management system can track work orders from date of generation, through assignment, update, and completion. These systems can also track employee workload, productivity, backlog of work orders, and the length of time work has been outstanding. Updates on assignment status and notes, such as "parts ordered," are provided to end users automatically. Employees can update the work order status in real time on mobile devices, and receive work orders as they come in. Response times automatically improve with the speed of electronically communicated work orders. Work order systems like this are widely considered to be fundamental to basic operations. The statewide success of automated work order systems in district large and small prove the worthiness.

Facilities Reservation Process

The facilities reservation process is also paper-based, with limited ability for tracking and no feedback loop to those involved. The FMOT department does not handle the entire facilities reservation process. Business services receives the applications, checks for proper insurance, and then forwards the application to FMOT. One of the administrative assistants for FMOT receives the application, arranges for event setup or key distribution, as needed, and then returns the application to business services for invoicing. School sites are consulted via phone call or email regarding availability at the site for the requested event. Because of the number of steps and individuals involved, the paper-based facilities reservation process is time consuming. To avoid schedule conflicts, the M&O administrative assistant keeps a paper master calendar for the district. Anyone wishing to view the master calendar must visit the FMOT office.

During FCMAT's fieldwork, school personnel described the confusion that ensues when a schedule change is made and one phone call in the chain of communication is missed. Currently, the only way to get accurate information about the status of a facilities use request is to call the M&O office, which consumes administrative assistant time.

Software-based facilities reservation systems are standard in school districts. These systems enable staff to check application status and can automatically generate email notifications of schedule changes to alert end users, school site staff, and those working at the event. A system like this will remedy the deficiencies noted above, streamline communication between M&O and the business office, and facilitate invoicing. It would reduce the time that an M&O administrative assistant spends tending to the paper-based system. At a minimum, and while the district is in the process of acquiring a facilities reservation system, the paper-based master calendar could be transferred to a free digital calendar platform accessible to many users. One example platform is a shared Google calendar.

Routine Restricted Maintenance Account

The district participates in the state School Facilities Program. Under this program, Education Code Section 17070.75(2)(A) requires a routine restricted maintenance account (RRMA) resource to be established within the general fund. As a condition of receiving apportionments under the program, the district must set aside 3% of its total general fund budget expenditures (including other financing uses) for the next 20 years to maintain its school facilities. Any amounts unexpended from the RRMA at fiscal year end will be designated as a restricted ending balance. However, by charging the routine restricted maintenance account an indirect cost

rate, the district can reduce the overall amount of unrestricted funds that must be placed in the account.

FCMAT's interpretation of current code and regulation is that the district can charge any costs associated with the maintenance of the facilities or grounds to the RRMA, including an indirect cost rate. The California School Accounting Manual defines indirect cost rate as:

> "… those costs of general management (i.e. activities that are for the direction and control of the local educational agency's [LEA's] affairs) that are agencywide. General management costs consist of expenditures for administrative activities necessary for the general operation of the LEA (e.g., accounting, budgeting, payroll preparation, personnel management, purchasing, and data processing). Also included in indirect costs is a proportionate share of plant maintenance and operations and facilities rents and leases attributable to the administrative activities on the basis of space occupied."

The district does not charge all that it could to the RRMA – specifically, costs associated with maintaining the grounds. This makes the maintenance program appear to live within the 3%, when, if appropriately accounted for, it would be clear that the maintenance program costs the district more than the 3% minimum.

Maintenance Staffing Levels

The Association of Physical Plant Administrators (APPA) provides a formula for determining appropriate maintenance staffing based on the desired level of service. The levels of service are as follows:

- Level 1 – Showpiece Facility (the highest standard)
- Level 2 – Comprehensive Stewardship (the recommended staffing level for schools)
- Level 3 – Managed Care (work order response time can be lengthy, and facilities' conditions remain stagnant)
- Level 4 – Reactive Management (facilities' conditions deteriorate at an accelerated rate)
- Level 5 – Crisis Response (maintenance staff can only respond to emergencies)

Using the APPA formula for maintenance staffing (http://www.appa.org/fourcore/), the following table shows the number of full-time employee (FTE) positions the district needs for each level of service:

Level of Service	# of FTE
Level 1 – Showpiece Facility	12.3
Level 2 – Comprehensive Stewardship	8.8
Level 3 – Managed Care	6.3
Level 4 – Reactive Management	5.0
Level 5 – Crisis Response	3.0

The maintenance department has five general maintenance workers and eight specialty maintenance workers. However, for the purposes of this analysis, the warehouse driver, although shown

on the organizational chart as a specialty maintenance worker, should be considered separately, as the duties of that position do not contribute directly to building maintenance. This leaves 12.0 FTE in the maintenance department. With this level of staffing the maintenance department should be providing showpiece facility service to the district schools.

The showpiece facility level of staffing should provide near immediate response to work requests, a high level of customer satisfaction and confidence, mostly preventative maintenance with very little reactive maintenance, like-new finishes throughout the facilities, with a highly organized maintenance crew that can respond to all but the most complex tasks (https://www.wku.edu/facilities/appa_standards.pdf). This is not the level of service that the maintenance department provides. Twelve FTE provide a level of service that a properly organized department could provide with nine – or fewer – employees. Line staff expertise is not the cause, as FCMAT interviews revealed a highly competent and motivated crew. Access to materials and supplies is not an issue either, as the district has invested in the maintenance department. The inability to use the high level of staffing to provide a high level of service to the schools is primarily the result of a lack of these standard organizational structures: an automated work order system, a formal preventative maintenance plan, formal staff training, clear leadership structures, a focus on customer service, and solicitation of end user feedback. Maintenance staff members have done an admirable job of providing service to the school sites, overcoming the lack of organizational structure to support them. Overstaffing has masked the inefficiencies in the department.

Aside from addressing the issues that are causing department underperformance, financial realities dictate that two options for staffing must be considered. The standard recommended staffing for school districts is level 2, comprehensive stewardship. However, the district's fiscal status may necessitate staffing at Level 3, managed care. The level of staffing is at least partly contingent on the implementation of other recommendations in this report. Without the basic organizational tools that the maintenance department has thus far been reluctant to adopt, overstaffing will continue to be necessary to provide a standard level of service.

If the district opts for a comprehensive stewardship level of service, nine line staff FTE would be required. The following positions are recommended:

Position Title	# of FTE
Electrician	1
Locksmith/Welder	1
Plumber	1
HVAC Technician	2
Aquatic Facilities Operator	1
General Maintenance	3

The retention of most of the skilled trade positions is critical. Even if Coalinga-Huron were not geographically isolated, utilizing in-house expertise for ongoing technically complex tasks is generally more cost effective than outsourcing.

The hazmat/safety/painter position could be phased out. Staff state that the painting duties have already been absorbed into the general maintenance duties. Department leadership can conduct the hazmat and safety duties. Having a dedicated position for safety and regulatory compliance is a luxury for a district of this size, and the importance of regulatory compliance warrants the attention of management staff. A transition plan for the transfer of duties should be made.

Also available are free and reduced cost training and risk management services provided by the district's property and liability or workers' compensation joint powers authorities.

Maintenance of the single aquatic facility requires neither a full-time position nor a person working only at that specific facility. The aquatic facilities operator could be assigned a number of general maintenance tasks in addition to the aquatic facilities duties. These duties should not include sprinkler repair (as was reported by staff to be the case) since that is a task for which grounds staff are paid at a lower level to complete.

If the fiscal challenges facing the district force consideration of a lower level of maintenance service, the following plan may be implemented for level 3, managed care. This is not a viable long-term choice for facility maintenance, but is an option for a fiscal crisis. Under a managed care model the district's staffing could be as follows:

Position Title	# of FTE
Electrician	1
Locksmith/Welder	1
Plumber	1
HVAC Technician	2
Aquatic Facilities Operator	1

Using this staffing model, the maintenance department would retain the technical expertise necessary to safely maintain the facilities without facing the need to outsource technical expertise. Job descriptions would need to be revisited to ensure that all general maintenance tasks could be completed.

Campus gates are unlocked in the morning by maintenance staff who drive to specific gates for that purpose. Staff who are already at the school site can complete this task. School districts generally use campus supervisors or site custodial staff for this duty, or add the task to teacher or administrator morning duties, as those individuals are frequently already walking the campus to usher in students.

Training and Employee Manuals

In response to FCMAT's request for employee training information, the director supplied the following statement: "All Maintenance, Custodial, and Grounds employees are trained on the job." Employee manuals are needed for each position that cover, at a minimum, these subjects: general safety; safety concerns, equipment manuals and training resources specific to the position; preventative maintenance schedules; department standard operating procedures; and emergency response plans.

Purchasing

Interviews revealed that staff have no formal purchasing thresholds. Staff provided inconsistent answers as to which purchases require a superior's approval. While there does not appear to be ongoing abuse of purchasing, the lack of formal, published standards or procedures precludes accountability should a transgression occur. Typically, employee manuals would contain these purchasing procedures and guidelines.

Regulatory Compliance

Department leadership has delegated the important task of regulatory compliance to line staff. During interviews, staff members at multiple levels, including department leadership, repeatedly referred to regulatory compliance (such as Occupational Safety and Health standards, storm water compliance, Healthy School Act compliance, Asbestos Hazardous Emergency Response Act inspections) as "playing the game." As noted elsewhere in this report, the district fails to meet Education Code requirements for compliance with some of these laws. Some compliance issues, in addition to affecting student and staff safety, could result in financial penalties for the district. Certain storm water pollution failures could result in up to $10,000 per day fines from the regional water quality board. For these reasons, regulatory compliance should be treated as a serious task. While regulatory compliance can be onerous at times, nothing beneficial will come of communicating to staff that it is unnecessary. Department leadership must set the tone and train staff in the importance of regulatory compliance, including the reasons why certain tasks are required and must be executed with fidelity. This will empower the staff to make good decisions about employee and student safety.

Preventative Maintenance

The district was unable to provide any documentation of a preventative maintenance program. Interviews revealed, however, that the maintenance staff completes preventative maintenance work. The type and frequency of the work completed is left entirely up to the expertise and willingness of the maintenance staff member under whose purview the work falls. No formal documentation is kept of the work completed, although diligent staff members do keep their own notes. This completely informal preventative maintenance structure carries the inherent weakness that critical preventative maintenance tasks will be missed if a key employee leaves the organization or is out sick during the time period when the task needs to be completed.

A preventative maintenance program is a standard maintenance practice for school districts in California. The most common way to execute a preventative maintenance plan is a systematic evaluation of building systems and system components, including roof systems, wall systems, HVAC systems, refrigeration equipment, electrical systems, gas lines, plumbing distribution and waste, and fire alarm systems. The program can then be integrated into an automated work order software that will generate the preventative maintenance work orders on a set schedule and track the completion of the work.

Standard Operating Procedures and Staff Expectations

The district was unable to furnish FCMAT staff with any standard operating procedures or written expectations for maintenance staff. These are widely considered to be basic structures in school district maintenance departments. An inventory of key departmental processes and likely emergency situations is needed, along with standard operating procedures for maintenance staff to follow. Training maintenance staff in these procedures will guide them in responding to emergencies and will set behavioral expectations.

Site Specific Issues

Site-specific issues that result in inefficient service to school sites have not been addressed. Two issues in the gym at Huron Middle School provide examples: There is exposed insulation on the underside of the roof that is an ongoing maintenance issue. Every time an errant ball travels too

high, a work order becomes necessary to put the insulation back in place. Also, the telescoping bleachers are not motorized and the mechanisms are not well-maintained. Two maintenance or custodial personnel are needed every time the bleachers need to be extended or retracted. Both of these issues waste staff time. If the bleachers were maintained and motorized, a single adult on campus could operate them without having to schedule maintenance/custodial support for every event. Covering the underside of the insulation would provide a near permanent fix to something that is an ongoing repair need.

Storm Water Compliance

A consulting firm developed the district's Storm Water Pollution Prevention Plan (SWPPP), and district staff are only moderately familiar with its contents. Based on the interviews with staff, it appears that the SWPPP focuses on the Coalinga bus facility only. However, the bus activities at the Huron bus yard, as described to FCMAT staff, include bus washing and some maintenance. If that is the case, this facility must be included in the SWPPP. Failure to do so could result in significant fines. If the activities at the Huron yard qualify as industrial activities as listed on the Industrial General Permit, an SWPPP for that facility would need to be developed, or the industrial activities ceased and conducted only at the Coalinga facility. Possible noncompliance with the Industrial General Permit is another example of why department leadership should not delegate important regulatory compliance tasks to line staff without a clear system of accountability.

Recommendations

The district should:

1. Define areas of responsibility regarding the dual supervision of specialty maintenance staff, and communicate those roles to staff members.
2. Support the coordinator of maintenance and operations through training and the development of department organizational structures.
3. Clearly define and articulate the role of general maintenance staff, and build the capacity of these staff when they work with specialty maintenance staff.
4. Purchase and implement a web-based work order management system.
5. Purchase and implement a software-based facilities reservation system that integrates with the work order system. While this project is in progress, transfer the paper-based master calendar to a shared electronic calendar accessible to multiple users.
6. Consider charging indirect costs to the RRMA resource.
7. Properly account for grounds maintenance expenditures under the RRMA resource.
8. Determine the level of maintenance service that is desired and financially sustainable, and staff the maintenance department accordingly.
9. Phase out the hazmat/safety/painter position over the next year and incorporate those duties into the department leadership's responsibilities.

10. Assign general maintenance work orders to the aquatic facilities operator.
11. Develop employee manuals and provide trade-specific training for each maintenance position.
12. Develop and communicate purchasing protocols for the department.
13. Require maintenance department leadership to diligently follow laws related to regulatory compliance and communicate to line staff the important reasons behind safety and regulatory compliance programs.
14. Develop and publish a preventative maintenance program. Input this program into the work order management program so that preventative maintenance work orders are automatically generated on the proper schedule.
15. Develop and publish department standard operating procedures so that end users know what to expect and maintenance staff know what is expected of them.
16. Install a hard ceiling to protect the uncovered roof insulation at Huron Middle School, and install a motor on the telescoping bleachers.
17. Ensure that department leadership assesses the facilities and plans projects in a manner that considers staff efficiency.
18. Review the activities at the Huron bus yard and ensure compliance with the Industrial General Permit.

Grounds

Staffing Levels

The Association of Physical Plant Administrators provides a formula for determining appropriate grounds staffing based on the desired level of service, as follows:

Level 1 – State of the Art (the highest standard)

Level 2 – High Level (this is the recommended staffing level for schools)

Level 3 – Moderate Level

Level 4 – Moderately Low-Level

Level 5 – Minimum Level

Using the APPA formula for grounds staffing (http://www.appa.org/fourcore/) the following table shows the number of FTE positions the district needs for each level of service:

Level of Service	# of FTE Required
Level 1 – State of the Art	10
Level 2 – High Level	7
Level 3 – Moderate Level	5
Level 4 – Moderately Low-Level	3
Level 5 – Minimum Level	1.8

The grounds department is staffed with nine FTE plus the sanitation worker. The role of the sanitation worker is not factored into this analysis, as the work accomplished by that individual does not seem to directly relate to grounds maintenance. This level of staffing, if used efficiently, should provide the district's schools with a level of service approaching state of the art. However, FCMAT staff found that the level of service is inconsistent and of lower quality than would be expected given the staffing. Although some grounds conditions at the high level were seen during the review, FCMAT also saw examples of moderate and moderately low-level grounds maintenance.

The disparity between the staffing level and the level of service provided can be attributed to four causes: the lack of department leadership and organizational structures noted in this report; the lack of a published grounds schedule (no set expectations); a lack of staff training and skill development; and a lack of specialization within positions. The first three causes are discussed in other sections.

If the district desires Level 2 service, as is recommended for school districts, these positions are recommended:

Position Title	# of FTE
Working Lead/Irrigation Specialist	1
Mower/Equipment Operator	2
Grounds Worker	4

The working lead/irrigation specialist would be responsible for programming the irrigation clocks, irrigation valve and main line repairs, training other grounds staff, and pesticide applications. This position would relieve the plumber position of the valve and mainline repair work, and would also reduce the coordinator's span of control to a more manageable level. It also would facilitate the implementation of other recommendations in this report, including Healthy Schools Act compliance.

The district also needs a dedicated mower/equipment operator position. Although the district has a truck and trailer capable of transporting the riding mowers and lawn tractors, it is not used to the district's advantage. Instead, all grounds workers are responsible for mowing their individually assigned schools. To accomplish this, the district maintains five lawn tractors/riding mowers and two tow-behind mowers. The district could reduce this to three or four pieces of equipment, lessening the maintenance burden on the mechanics, with the two dedicated mower operators on assigned schedules.

Should the financial position of the district lead to the decision to provide a lower level of service, Level 3 staffing would be as follows:

Position Title	# of FTE
Working Lead/Irrigation Specialist	1
Mower/Equipment Operator	2
Grounds Worker	2

Staff Training and Knowledge

With only a few exceptions, interviews with grounds staff revealed a lack of knowledge and training on irrigation systems, types of turf and turf care requirements, soil heath and fertilization requirements, weed identification and treatment, and pruning techniques appropriate for specific

tree species. This lack of knowledge shows in the disparity between the level of staffing and the level of service.

Improving efficiency and level of service will require formal training of grounds staff. Ideally, a lead worker or the coordinator of maintenance and operations would conduct this training. Training resources include the International Society of Agriculture website (low-cost trainings are available), irrigation system manufacturer's training, the Irrigation Association website (low-cost webinars), mower manufacturer training, and the local Agricultural Extension office. All of these resources should be explored for low-cost and free training to increase the capacity of staff members. While urban areas may sometimes lack staff members with knowledge of agriculture or irrigation, in the agriculturally rich San Joaquin Valley this is not expected to be a challenge.

In the absence of formal training or department standards, staff members use their own judgment regarding best practices. One grounds staff member reported that he prefers to stripe fields with chalk instead of paint. Chalking a field is a temporary measure that disappears with mowing and irrigation. Restriping then requires going through the process of remeasuring the field. In contrast, fields striped with marking paint, which does not wash away when irrigated, can be quickly restriped without remeasuring. This is just one example of how lack of standard procedures can devolve into inefficiency.

Lack of Expectation or Published Schedules

The grounds department was unable to furnish FCMAT with grounds maintenance schedules. There appears to be no set schedule for mowing frequency, trash pickup, edging, tree trimming, or other grounds tasks. As a result, school site staff do not know what to expect or when to expect it. The grounds staff are accountable to no formal standard. The result is that the level of service lags. When questioned about grounds schedules, staff members provided inconsistent answers to the frequency of basic tasks, or who is responsible for what. Simple questions, like who to contact to adjust a watering schedule, yielded different answers. This lack of standards is demonstrated in the inconsistency with which the grounds are maintained. Some conscientious staff members maintain their assigned areas in excellent condition. Many others, however, take advantage of the lack of structures and underperform. FCMAT staff saw areas at school sites that had gone weeks without mowing or edging.

A grounds maintenance standard of care and schedule of grounds duties would specify mowing days for each campus, frequency of edging and debris removal, tree care plans, and levels of expectation for staff. Publishing this schedule and standard would let school sites know what to expect, and let grounds staff know what is expected of them. A recommended practice is to put ongoing maintenance tasks on a four-day schedule, so that the fifth day of each week can be dedicated to group work on grounds projects, or for catch-up should grounds staff be pulled away from normal assignments to respond to an emergency.

Tree Inventory

The grounds department does not have a tree inventory or record keeping system for tree maintenance. Trees – especially if they are diseased or improperly maintained – can pose a hazard to students and staff members. A tree inventory noting tree condition and plans for appropriate actions for tree care will prevent accidents and limit the district's liability.

Healthy Schools Act Compliance

FCMAT found only partial compliance with the Healthy Schools Act (Education Code 17608-17614). Although the district is completing training and reporting requirements, the effectiveness of this training is called into question by the failure to comply with posting requirements. Any time an EPA-registered pesticide is used on school grounds, posting requirements must be met: this includes posting warning signs 24 hours before and 72 hours after pesticide application. Staff members report not meeting these posting requirements, were unable to provide any documentation of meeting these requirements, and were unaware of the requirements during interviews with FCMAT. The following link from the Department of Pesticide Regulation provides a useful summary of Healthy Schools Act requirements: https://www.dtsc.ca.gov/Schools/upload/SC_CGHS_HSA_Reqs_For_Schools-2.pdf

The Department of Pesticide Regulation website provides model program recommendations and guides to implementing the requirements of the Healthy Schools Act.

Pest Control

While reviewing department records FCMAT staff found a purchase order for monthly pest control service from an independent contractor. When district staff were questioned about what applications were done, staff members were unable to provide a specific answer beyond that the pest control contractor provides advice on pest control. District staff were unable to provide records on what work the contractor had completed. Of greatest concern, based on the information and records furnished by district staff, it appeared that the contractor does not follow Healthy Schools Act posting requirements.

Since the pesticide application being conducted by the contractors does not appear to be restricted materials, and since district staff conduct other pesticide applications, the district could either ensure that the contractor is in full compliance with the Healthy Schools Act requirements or take this work in house. If the contractor is needed for consulting and information purposes, a consulting contract is more appropriate. As a more cost effective measure, training and information in pest control is available from the local County Extension office, the Agricultural Commissioner's Office, or the University of California, Davis website on integrated pest management.

Maintenance and Grounds Leadership Structure

A lack of basic organizational tools, documentation and structures impedes the maintenance, grounds, custodial, and transportation functions, resulting in the inefficiencies that have necessitated overstaffing to meet the district's basic needs. Although facilities was beyond the scope of the investigation, during fieldwork FCMAT received information about the district's facilities program and had an opportunity to review facilities program documents. The facilities program appeared precisely organized, well-planned, and properly documented. The facilities program is where the director chooses to focus his energies.

Now that the district faces a financial crisis that precludes such high staffing levels, the same work will need to be accomplished with efficient maintenance, operations, and transportation activities. This will require a department leadership team that is committed to addressing the inefficiencies and implementing organizational tools.

As the district is set to receive the proceeds of the general obligation bond sales approved through Measure R, and begin the bond construction program, the need for facilities/bond program leadership will increase significantly. The district could use the current director's skill and institutional

knowledge in the capacity of bond program manager, using bond program funds. Similarly, the administrative assistant position that is almost solely dedicated to facilities projects could also be funded through the bond program. Bond counsel can ensure that the language in Measure R permits these expenditures. Maintenance, operations, and transportation functions could be overseen by a separate position of director, and the coordinator of maintenance and operations would report to that director. As noted above, a lead grounds worker would also be included in the leadership structure.

Recommendations

The district should:

1. Determine the level of grounds service that is desired and financially sustainable, and staff the grounds department accordingly.
2. Develop specialty positions in the grounds department: working lead/irrigation specialist and mower/equipment operator.
3. Train and assign irrigation clock programming and valve repair to grounds staff instead of the district plumber.
4. Provide training to grounds staff to grow their capacity and knowledge.
5. Develop a grounds maintenance standard so that site staff know what to expect and grounds staff know what they are accountable for delivering.
6. Develop and publish grounds maintenance and mowing schedules so that site staff know what to expect and grounds staff know when to complete key tasks.
7. Develop a tree inventory and long-term tree maintenance program.
8. Require department leadership to become familiar with the requirements of the Healthy Schools Act.
9. Train and require district staff and contractors to comply with the warning posting requirements of the Healthy Schools Act.
10. Have grounds staff apply all non-restricted pesticides, and provide staff training on pesticide use.
11. Revisit the department leadership structure as described above.
12. Reassign the administrative assistant whose job duties are almost solely focused on facilities projects to the bond program.

Transportation

Funding and Finance

School transportation in California has been inadequately funded for many years. Until 1977 school districts reported their operational costs, and the state reimbursed those costs in the subsequent year. Capital costs were never reimbursed. After the passage of Proposition 13 in 1978, the state gradually reduced the percentage of reimbursement. In the 1982-83 school year only 80% of reported costs were reimbursed, and in that year the state capped the apportionment to each district at 80% of the reported cost amount. Only occasionally through the years have there been cost of living adjustments (COLAs). Costs have risen and the revenue has not kept pace; thus the state's share of the funding covered only approximately 45% of reported costs in the 2008-09 school year. That was the highest recent year of funding and it was identified as each participating school district's approved apportionment. During the Great Recession, the state reduced all categorical program funding, including transportation, by approximately 20%. This reduction effectively means that, on average, the state now covers less than 35% of the statewide cost of pupil transportation, with the percentage varying widely among districts.

With the implementation of the state's Local Control Funding Formula in the 2013-14 fiscal year, school districts continued to receive the amount certified in April 2013. Under LCFF, transportation revenue has never received a COLA, is restricted to transportation use and is subject to a Maintenance of Effort (MOE) that requires districts to spend at least as much as they receive. For the Coalinga-Huron Joint Unified School District that was $428,093. The 2015-16 expenditures for transportation were $1,816,175.58. The 2016-17 expenditures for transportation were $1,493,711.60. The budgeted 2017-18 expenditures are expected to be $1,611,718.92. If that amount holds, the state funding will cover approximately 26.5% of the overall transportation expenditures. Because the state suspended school transportation data reporting at the outset of LCFF, there is no way to compare the district's transportation costs with its neighboring or comparative school districts. Although the district receives less than the overall statewide percentage of reimbursement funding, it is not an indicator of inefficiency, but rather reflects the district's transportation costs when they were capped 34 years ago.

The district's transportation costs decreased significantly from the 2015-16 fiscal year to the 2016-17 fiscal year. This can be explained by rather large expenditures in 2015-16 for capitalized and non-capitalized equipment that did not occur in the 2016-17 fiscal year.

The district operates 10 passenger vans to transport small student groups or teams. These groups are charged $1.38 per mile for the use of the vans. Although FCMAT has seen lower and higher rates charged by other school districts for similar use, the district has no operational or cost data to justify this rate. The current IRS rate for mileage is $0.535 per mile. The American Automobile Association reports ownership and operating costs of small, medium and large sedans that ranges from $0.366 per mile to $0.926 per mile depending on the cost of the vehicle and the mileage that the vehicle is operated annually. The district's rate can be calculated based on its actual costs that will include administrative costs, purchase or financing costs, maintenance and fuel costs.

Field trips performed on school buses have been charged to users at $4.07 per mile. An additional $36.08 per hour amount is charged on any trip for which the driver enters overtime. All drivers are paid eight hours per day for bus driving and other assigned duties, so on most field trips the driver will enter overtime. The department is unaware if this rate covers its costs for field

trips, or is overcharged or undercharged. An analysis of this rate would determine if it is fair and adequate. Field trips are charged to the appropriate school or department, and are credited to the transportation department budget through internal budget transfer.

A daily, mid-day trip takes students from Coalinga High School to the school farm, which is off-site, and back to school later in the day. Historically, this service has not been charged as a field trip. Typically, home-to-school service is included in a school district's transportation costs. A mid-day trip such as this is not considered home-to-school transportation.

The field trip approval process is cumbersome. The district's form requires various levels of administrative approval. At times, the approval form has not been received the day prior to the trip, requiring additional contact from the transportation department to the teacher, coach or administrator to prompt the approvals. Although the trip should not go if the approvals are not received, some do. This could result in trips for which funding has not been approved.

Non-school bus (white fleet) vehicle maintenance, parts, fluids and fuel are not charged to the departments receiving these services and commodities but are charged to the transportation department, unreasonably inflating the transportation budget to cover non-school transportation costs.

All bus driver time is charged to the transportation department, even though every driver is assigned to other duties for part of their workday. Some drivers perform grounds or custodial related work as a part of their job description and daily assignment. Even though these duties are a part of the bus driver job description, the portion of work performed for other departments should be charged to those budgets.

Tires are purchased from a local vendor, but the invoices do not show whether the district pays state bid prices, which would be the lowest price available to a school district. The invoices do indicate that the district is not charged federal excise tax. This is consistent with federal rules.

Invoices for gasoline show the district is exempt from federal excise tax and not exempt from state excise tax. This is consistent with federal and state rules. However, although the district is exempt from state tax for diesel fuel, invoices show state excise tax charges for diesel.

In 1992 the California Supreme Court ruled that it was legal for school districts to charge fees for home-to-school transportation under certain rules. Coalinga-Huron Joint Unified School District does not charge fees. Students that are indigent or have an individualized education program (IEP) requiring transportation as a necessary related service are exempt from fees. Most school districts define indigent as those who qualify for free or reduced price lunches. Since approximately 81% of the district population qualifies, it would cost more to administer the program than the fees that would be collected. The district, however, has implemented a process to register high school students for transportation service. Extending registration to elementary and middle school students would let the department know which students are riding buses and where their bus stops are in relation to their residence.

Recommendations

The district should:

1. Evaluate the rate charged to school departments for van use to determine if it is adequate or undercharges/overcharges.

2. Evaluate the rate charged for bus field trips to determine if it is adequate.
3. Charge the daily school farm transportation as a field trip.
4. Streamline the field trip approval process.
5. Provide home-to-school transportation without charge, and register all students who ride school buses.
6. Charge all non-school bus labor, parts and fuel to the appropriate departments.
7. Charge appropriate percentages of driver salary costs to grounds or custodial departments.
8. Ensure the district receives state bid pricing for tires.
9. Ensure the district is exempt from state excise tax for diesel fuel purchases.

Routing

The district operates 13 home-to-school routes for regular education students and three routes for severely disabled special education students. The special education routes are customized and provide door-to-door service for students whose IEP requires transportation as a related service and who attend programs in the district. Each home-to-school route serves a defined geographic area, and transports all of the elementary, middle and high school students in these areas. These routes have been largely unchanged over the years, even though ridership has declined. Users of the system generally consider the district's school transportation system to be safe, timely and responsive to their needs.

Due to reduced school transportation funding, school districts throughout California have reduced or eliminated regular education school transportation. The strategies to reduce pupil transportation costs include extending non-service zones to reduce the number of students who qualify for transportation, aligning bell times so one bus can be used for more than one run or eliminating service to certain geographical areas. Each bus route costs the district approximately $63,000 per year to operate. On average, it costs the district approximately $2,400 per student to provide school transportation service.

Board Policy 3541 (a) states, "Transportation for Home to School will be provided to those students whose address is 2 miles or greater in radius from the center of Dawson School Administration Office or the Huron Elementary School Administration Office." The district does follow this policy, except for the trailer park and subdivision just east of Coalinga on Highway 198 across the bridge. Transportation is provided to this area even though it is within the two-mile non-service radius. School districts often will provide service within their non-service zone for safety or local reasons. The non-service area is a radius as measured from a central point or school, rather than a distance walked or traveled along regular surface streets. It should be expected and articulated that parents ensure the safe travel of their children to and from school if they walk or ride a bicycle. In the same fashion, parents should be expected to accompany their child to the bus stop and remain with them to ensure their safety.

In addition, Board Policy 3541(a) states, "The district authorizes that students who are in kindergarten and need to be on take home runs for Los Gatos and Warthan Canyons and all Special

Day Class Students shall be entitled to In-Lieu of Transportation Fees." The special education director stated that the district did not pay parents travel expense for transporting students in lieu of providing bus service in the past, and that no students currently qualify for these payments. There is no stated process for determining this payment. If parents are paid in lieu of transportation service in the future, a contract is needed to articulate the responsibilities, indemnify the district and specify a reimbursement rate. Generally, these fees are paid based on the distance between a home's entrance to a public road and the closest bus stop. The district should not pay for travel on private roads to get to the nearest public road. A sample in-lieu contract is attached as Appendix B.

The district is not required to pay parents or guardians in lieu of providing school bus transportation. Eliminating the current levels of service would not necessitate paying parents to transport to school or to the nearest bus stop.

In Coalinga, all of the schools are centrally located in town. In Huron, the elementary school and middle school are close to each other. Because of this, it does not appear that bell-time realignments could significantly benefit transportation efficiency. The district could, however, operate two runs for many routes in the morning and afternoon by increasing supervision time at schools. With this scenario, drivers would pick up one group of students earlier in the morning and drop them off at school, then travel to another area to pick up students to be dropped off at school close to the bell time. In the afternoon, at bell time, one group of students would be picked up and driven on their route home, with the bus returning to school later for another group. The district's "Guide to Student Transportation" states that riding time is approximately 45 to 60 minutes. No state law or regulation limits maximum riding times. When there is higher absenteeism such that not all routes are covered, the department has strategies whereby drivers assist by picking up students from other routes. In some cases, these can be incorporated into the existing routes without arriving at school late. These strategies could be implemented permanently to reduce the total amount of bus routes necessary.

District ridership reports indicate that all but two of the bus routes have relatively full loads. Two routes (Routes J & K) that serve the Huron area report approximately 11 students on each route. One of these routes serves the northern part of Huron, and the other serves the southern part. Each of these routes is nearly an hour long. The two routes could be consolidated, but it would mean a longer bus ride for some students. The statement relative to ride time would have to be revised in the transportation booklet if these two routes were consolidated.

There are two routes in the western part of the district, each serving a different remote canyon (Los Gatos and Warthan). Ridership from the most distant part of the canyons to their starting points is quite low. The district could consider eliminating service to these two canyons. Students could still ride the bus by getting to the bus stop at the base of each canyon. Board policy would need to be revised to reflect that service would not be provided in these specific canyons.

As noted earlier, a regular shuttle route is provided from Coalinga High School to the school farm each school day. This service has not been charged to the program, but is rolled into the cost of home-to-school transportation.

One after-school activity route and two after-school program routes serve students that stay at school later. Some school districts have eliminated their after-school activity trips as a cost-saving measure. Activity routes are generally considered home-to-school transportation and are not usually invoiced separately. The district should ensure, however, that the after-school program route is charged appropriately. Often, grant funds are available for this service.

Some students attend district schools on interdistrict agreements with neighboring districts. Some of these students are driven to district bus stops and benefit from Coalinga-Huron's transportation service. The bus routes currently have room for these students. Generally, however, interdistrict transfer students are not guaranteed transportation service.

The district also allows students who reside in the Huron area to choose to attend schools in Huron or in Coalinga. Some bus routes overlap geographic areas, as one bus serves students who attend Huron schools, while the other bus route serves students who attend Coalinga schools. Without detailed demographic data, FCMAT cannot determine whether or not additional transportation savings could be achieved by eliminating this practice. There may be school capacity issues or other academic reasons why this practice may be desirable.

The bus route face sheet that indicates each bus stop location and the time of the bus stop is typed in a standard format by the office staff. Route sheets do not include specific directions and whether or not students must be escorted to cross the road as required by law. At one time drivers wrote specific directions; however, that practice has ceased. Detailed route sheets are needed with specific directions relative to bus stops that are exempt from using red lights and bus stops at which students must cross the road, as well as turn directions.

When a special education student requires transportation as a related service as indicated on the IEP, the special education department telephones or e-mails the details to the transportation department. Often, the transportation department learns of critical information after the service begins. A form is needed that indicates the start date, program location, home address, and disability or medical condition of the student and whether or not specialized equipment is required. A sample form is included as Appendix C. Approximately five special education students attend programs outside the district. They are transported on a contract operated by a for-profit contractor (First Student) for the Fresno County Special Education Local Plan Area. The reported cost for the 2016-17 fiscal year is approximately $13,000 per student. The district has made a concerted effort to provide its own special education programs, limiting this very expensive need for transportation outside the district. The district could not provide this service without substantial additional cost.

Staff reported that the transportation department picks up some special education students as much as a half-hour prior to the afternoon bell time. The only reason this practice exists is so the school bus drivers can load the students and leave the school prior to the heavy afternoon parent pick-up traffic. Students must receive all the required academic time.

Two of the three special education bus routes have aides assigned to them. These are classroom paraprofessionals who ride the buses to provide additional behavioral support for the driver. No students require an aide per their IEP. The special education department places the aides on these two routes and funds the additional time for these employees. It would be appropriate to charge the transportation-related time of these aides to the transportation department budget.

Two of the bus routes (B & J) go into overtime every day. These drivers have other district duties. The additional duties should be reduced so these drivers do not regularly enter overtime.

The district has an ongoing practice of having drivers report to the Coalinga bus yard although some bus routes originate at the Huron bus yard. Drivers report early and are shuttled to Huron on one or more buses. The individuals driving the buses are paid for the time. The drivers riding the buses are reportedly not paid for this time. Although this is a historical practice, it would be difficult for the district to defend that these employees are not in service to the district during this time. These drivers could drive their own cars to the Huron yard to perform service there.

There are no spare buses at the Huron yard, which could cause logistical or service issues if a bus were unable to start in the morning at this yard. There is no mechanical support at this yard.

The district purchased the TransTraks school transportation software program approximately six years ago but never used it. The program can perform rudimentary bus routing including a student list for each bus stop, and can maintain driver training records, institute electronic field trip booking and billing, integrate with an electronic fuel management system, maintain vehicle maintenance inventory and work order records, and generate valuable management information reports. Although a transportation department with only 16 routes should not need a computerized routing program, the program offers other valuable elements including reducing the labor of typing route sheets with specific directions.

The district could contact TransTraks to determine what it would cost to reinstate its contract. District officials may wish to visit some other local school districts that have successfully implemented the software program. Some of TransTraks' longer-term clients are Lemoore, Visalia, Madera, Merced High and Clovis, and its newer clients include Exeter and Kings Canyon. Not all districts implement all of the modules of the program, but they still consider it valuable and useful.

Complaints have been registered that some bus routes arrive at school in the morning right at bell time, not allowing students reasonable time to eat breakfast and get to class. It would be quite easy to move those bus routes approximately 15 minutes earlier to allow all students to eat.

Staff reported that one route was open (no driver assigned), another route was assigned to a driver who was on a long-term absence, and a driver was retiring at the time of FCMAT's field observations, resulting in potentially three uncovered routes per day. Three individuals have completed their classroom training and are ready to receive behind the wheel training to become school bus drivers. The district no longer has a state-certified school bus driver instructor and is exploring ways to get these drivers trained. Several employees can act as substitute school bus drivers, including two of the mechanics. No data was available relative to bus driver absenteeism trends, but department staff reported that typically one or more additional drivers call in sick each day. Drivers who are at work are very cooperative and creative in developing solutions to get all students to and from school safely, but that often means that students arrive at school late. There is no way for parents to know when a bus will arrive late to the bus stop.

Recommendations

The district should:

1. Consider instituting double runs on some routes to reduce the overall number of bus routes (potential staff reduction).
2. Consider consolidating the two Huron elementary school routes.
3. Charge the daily farm trips to Coalinga High School as a field trip.
4. Consider eliminating after-school activity routes, and/or the guaranteed overtime for two drivers.
5. Consider eliminating service to the two remote western canyons.

6. Type detailed route sheets in a format articulating turn directions, stop locations, the need to use red lights and escorting students.
7. Develop a form to request and detail the transportation requirements for special education students.
8. Cease the practice of picking up special education students prior to the afternoon bell.
9. Evaluate the need for special education bus route aides. Charge the cost of these aides to the transportation department for their time assisting on bus routes.
10. Evaluate the practice of driving the bus drivers to and from Huron.
11. Determine what would be necessary to reinstitute the school transportation software.
12. Move some morning routes 10 to 15 minutes earlier to ensure students have adequate time for breakfast at school.
13. Train more drivers as substitutes to cover bus routes.

Staffing

The transportation department is staffed as follows:

- 1 FTE maintenance, operations, transportation director
- 1 FTE transportation director
- 1 FTE transportation operations assistant
- 1 FTE lead mechanic (vacant)
- 3 FTE mechanics
- 15 full-time, 10-month school bus drivers
- 4 substitute school bus drivers (not always available)

The maintenance, operations and transportation director spends little time overseeing the transportation department, although he does have direct supervision duties over the mechanics. He relies on the transportation director to perform all supervision of the department staff.

There are 25 school buses and 70 other district vehicles. For a fleet of this size three mechanics is adequate. One could be designated a working lead. Two of the three mechanics also hold a certificate valid for driving a school bus. The mechanics drive bus routes to cover when the regular drivers are absent or driving field trips. This practice assists the district in covering bus routes; however, maintenance and repair time is severely reduced because these two mechanics frequently drive a bus route.

COALINGA-HURON JOINT UNIFIED SCHOOL DISTRICT BUS DRIVER ASSIGNMENTS			
Route	**Contract Hours of Driver**	**Contract Hours of Other Work**	**Actual Bus Driving Time**
A	8	2 (maintenance)	3.75
B	8	2.5 (bus yard)	5.25
C	8	1.5 (custodian)	5.5
D	8	unspecified (bus yard)	5
E	8	2 (grounds) 3/4 bus yard	2.75
F	8	3 (grounds and bus yard))	3.5
G	8	unspecified (bus yard)	3
H	8	no specified extra work	7.25
I	8	no specified extra work	7
J	8	2.5 (grounds)	2.5
K	8	4 (grounds)	2.25
L	8	2.5 (custodian)	3.75
M	8	unspecified (assist with inputting trips)	4.5
N	8	1 (bus yard)	2.75
O	8	1.75 (bus yard)	2.5
P	0	no specified extra work	1.5
TOTAL	120	22.75	62.75

Notes:

1. Bus yard work includes washing and cleaning vans, buses, cars, and fueling.
2. Grounds work is usually picking up trash on campuses.
3. Custodial work is at bus yard or other offices.
4. Assisting with inputting trips is office work at the transportation office.
5. Actual bus driving time includes all route time to and from yard and 30 minutes per day for pre-trip and clean.
6. Hours are per day.

The above chart shows 16 school bus routes. However, the same driver performs bus routes J & P, with one route in a big bus and the other in a smaller bus for special education students. The table above shows the hours for each driver assigned to the transportation department and the time that is assigned but not budgeted to other departments. The third column shows the actual bus driving time that includes bus pre-trip inspection and cleaning time. It should not be necessary to pay for more than an additional half hour per day for pre-trip and cleaning time.

Actual bus driving time totals 62.75 hours per day, but drivers are paid 97.25 hours per day for bus driving and unspecified duty time. This equals excess pay of 34.5 hours per day or $107,060 in annual salary alone, calculated at step 1 of the salary schedule for a 180-day work year. It is much more expensive because most drivers' pay is higher than step 1, with additional costs for salary-driven benefits and health and welfare benefits. Some of these drivers are expected to wash buses or fuel buses with this extra time, but this should only equal 2 FTE based on a generous calculation. The amount of time paid is much more than is necessary to fulfill department needs.

Nine bus drivers report to the Coalinga yard by 5:45 am. They board one or more of the buses and travel to the Huron bus yard where the Huron route buses are parked. Most of those routes come back to the Coalinga yard in the middle of the day, and at the end of the day the drivers

park the buses at Huron and ride back to the Coalinga yard. Drivers are not paid for this time, but the employees who drive the buses are. This is an unusual arrangement. The benefit for the drivers is that they do not have to drive their personal cars to and from Huron. The benefit for the district is that they do not have to pay for this time or the wear and tear and mileage for buses driving back and forth to Huron. This is a long-standing district practice. There may be some potential liability relative to this practice that the district may wish to explore.

Seven of the drivers also perform grounds work or custodial work for other departments as part of their bus driving classification. As noted earlier, this time is not charged to the other departments.

Some school districts in the state do supplement bus driver positions with other district duties to ensure full-time employment for these individuals. In some communities, it is very difficult to attract and retain individuals to this low-pay, high-responsibility and high-stress job, so they offer an eight-hour position. Although this is relatively common, it is also common that these employees are not always as productive in these combination positions. Often, the grounds, custodial or maintenance duties suffer and the district is cautious to discipline this aspect of the job for fear of losing the bus driver. Also, most districts perceive the bus driving need as tantamount, so when a last-minute trip comes up, the driver is pulled away from the other position. Ideally, these positions should not be guarantees. They should be separate, with the employee reporting to and providing service to the transportation program and separately reporting to and providing service for the other duties in clearly designated classifications. It is common knowledge at the district that some of the bus drivers who serve in these other duties are not as faithful in performing them as the district expects, including duties at the bus yard.

For the additional fueling and bus washing at the transportation facility, there should be an articulated job (perhaps a new classification) for which employees apply, are hired and are paid at an appropriate rate. It is not reasonable that a bus driver would be paid at their higher wages for a lower-skilled job, such as bus washing or fueling. It would most likely be a duty that could be performed with 1 FTE.

The drivers of Routes B & J receive some overtime pay daily. This is not necessary. The drivers are paid additional time during the day to perform bus washing or other duties for the district, and the overtime is earned every day by driving an evening bus route or other bus driving work. The drivers could remain below eight hours per day by eliminating the mid-day department duties or assigning them to another driver with the available time.

The transportation director was hired to succeed a recently retired individual. The previous transportation director was a state-certified school bus driver instructor. The new director has no school transportation experience and needs to be trained in school transportation laws, regulations and best practices. Securing the services of a state-certified school bus driver instructor would facilitate new-driver training and ongoing in-service training, which is critical to the department's success. This does not need to be a separate position, but rather someone who can become certified and work in that capacity as needed. The minimum requirement to attend the California Department of Education (CDE) three-week residential certificate program for school bus driver instructors is five years with an accident-free record. The classes have been rather full lately, and it may take over a year to secure a spot in the next open class. Attendance at the class does not guarantee certification. The program is extremely rigorous, and the candidate must be properly prepared.

One driver performs some office work by inputting field trips and preparing trip documentation. This driver does not assign trips. There is a need for additional clerical time, particularly if the maintenance shop implements an electronic work order system. This position would be a separate classification, with approximately 4 hours per day, 10 months required for these duties, with the transportation operations assistant performing the necessary work the other two months.

Substitute bus drivers consist of the two mechanics mentioned previously. The other substitute bus drivers are one individual who is only available during the winter, two retired drivers, and one individual who holds the appropriate license but is a full-time employee of the maintenance department (not always available to drive a school bus). The department could benefit from additional substitutes to assist the department's coverage of routes and trips.

Recommendations

The district should:

1. Fill the lead mechanic position from within, if appropriate, with a working lead mechanic. Consider having mechanics substitute on bus routes less frequently.
2. Consider reducing bus driving time to actual driving, pre-trip and bus cleaning time, separating job duties, and creating a separate position for bus washing, fueling and minor bus maintenance to reduce excessive department costs.
3. Review the practice of unpaid time for bus drivers traveling to and from the Huron yard.
4. Eliminate the daily overtime pay for the drivers of Routes B and J by restructuring responsibilities for those drivers.
5. Ensure the new transportation director is trained in school transportation laws, regulations and best practices. Secure a state-certified school bus driver instructor for the interim and consider preparing a driver to become one in the future.
6. Consider creating a 4-hour-per-day, 10-month clerical position for the department.
7. Train additional substitute school bus drivers.

Vehicle Maintenance, Fleet and Facility

Vehicle Maintenance

The California Highway Patrol (CHP) Motor Carrier Inspector Unit inspects buses, vehicle maintenance records, driver records, driver timekeeping records and federal drug and alcohol training records annually. They produce a report of their findings entitled the Safety Compliance Report/Terminal Record Update, more commonly known as the Terminal Grade. The two most current reports were performed on May 19, 2016 and June 14, 2017. Over the past five years, the district has received the highest grade the CHP awards, which is "satisfactory." This indicates

compliance with all laws and regulations relative to the regulated aspects of school transportation operation and is an objective measure of a school transportation operation's safety.

School buses are required to be inspected every 45 days or 3,000 miles, whichever occurs first, per Title 13 of the California Code of Regulations, Section 1232 (13 CCR 1232). The district keeps a white board in the shop listing the due dates of the inspections and performs them on a 30-day rotation. Mileage intervals are not recorded, so buses that are assigned to high-mileage routes are inspected every 15 days. Although this ensures general compliance with the regulation, it could be costly to perform inspections more frequently than necessary. FCMAT reviewed vehicle maintenance records and discovered that bus #115 exceeded the 3,000-mile maintenance interval by 32 miles recently. The propensity for this to occur is high because the department has no effective method for determining bus mileage on a regular interval other than reading the odometer in each bus. The electronic fuel management system could provide this information, as could an electronic school transportation software program. The electronic fuel management system (Gas Boy) has not been operational for several years.

School bus inspections are recorded and any repairs are listed on a work order form. Parts associated with the work order are not always attached or included, and the labor hours are not always recorded on the work order. Outside repairs are not always included in the file, and in some cases, the mechanics do not see the invoices to compare them with the work that was done. When a bus driver finds a defect during their daily pre-trip inspection, they report that in writing, and mechanics repair the items and follow the regulated practices related to the documentation of the repair. A work order is utilized to record the repair.

The repair orders and the past year's maintenance documentation are filed and eventually stored elsewhere. The maintenance data is not used to create useful management information.

All of the other district vehicles that include maintenance and grounds trucks and vans and passenger vehicles that transport small groups of students are on no discernible preventive maintenance program. Mechanics reported that they are repaired when a problem is discovered or reported. They report that every white fleet vehicle is tracked and scheduled for service and inspection at least once a year, but documentation does not support this claim. This practice can be very costly, as minor maintenance issues can develop into costly repairs or dangerous safety issues. The passenger vans that transport students should be on a preventive maintenance program similar to school buses.

Newer school buses and other district vehicles feature computer-controlled engines; however, the district lacks up-to-date diagnostic equipment, and mechanics have not received training in these newer engines, transmissions and components. Consequently, mechanics reported that occasionally a vehicle is towed out of town to another shop only to find out that the problem could have been repaired inexpensively if diagnostic equipment were in place. In addition, mechanics do not regularly receive available in-service training on preventive maintenance for newer vehicles. Mechanics own their own hand tools, and the district provides the larger and specialty tools necessary. The mechanics' tools are not inventoried. The district may be responsible for replacement if their tools were stolen. The district's insurance carrier would more likely cover the loss if there were an up-to-date inventory of those tools.

There is a parts room upstairs in the shop that is stocked with filters, belts, hoses and some glass. Mechanics reported that these are generally purchased in bulk for a discount and supply the district's needs for a year or more. A large portion of this room, however, is stocked with obsolete and useless parts that may have been for vehicles the district no longer owns. The parts room

is not well organized, is dirty and in general disarray. Obsolete parts should be returned to the suppliers for credit, sold to other operators that need them or declared surplus and removed.

Mechanics individually order parts from local or specialty suppliers as needed. They do appear to attempt to find the lowest cost suppliers. As noted above, parts are not always declared on the work orders, so repair costs may be difficult to determine. Further, each mechanic has the authority to purchase parts from a number of suppliers with whom the district has open purchase orders. Parts invoices are given to the transportation operations assistant for payment processing, but there is no process for the lead mechanic or another knowledgeable employee to review the purchases. This could expose the district to the possibility of parts purchased for personal use, although FCMAT discovered no evidence of this.

Gasoline and diesel storage are located in both the Huron and Coalinga yards. The maintenance department yard has diesel for "off-road" vehicles. The storage tanks are above-ground systems that appear to comply with current laws and regulations. At Coalinga there is a 10,000-gallon diesel tank and a 10,000-gallon gasoline tank. At Huron there is a 1,000-gallon diesel tank and a 1,000-gallon gasoline tank. The pumps at the Coalinga and Huron yards used to be controlled by a commercial, computerized fuel management software system that requires cards and data input to pump the fuel. That system has been inoperative for several years. District employees now report fuel usage by recording it on a fueling sheet at the pump location. At Coalinga, the gasoline tank power is turned off in the evenings in the shop. The diesel has no such shutoff, but has a lock to which all drivers have the key. FCMAT observed that the diesel pump was not locked one evening after hours. At Huron, the fuel shutoff switch is inside the shop, but during the day the shop is open and unstaffed. Without a security system or a method to authorize, record and reconcile fuel usage, there is the potential for theft. An operational software system could print out regular reports, assist in charging fuel to the proper department, and track mileages for the 3,000-mile inspection requirement. This system could be integrated into the TransTraks system to automatically input fuel usage if the district resurrected the software.

School districts are exempt from federal excise tax on diesel and gasoline, and state excise tax on diesel. Inspection of some recent fuel invoices indicated that the district is charged the state excise tax on diesel. This should be rectified with the fuel supplier.

The vehicle maintenance department performs most repairs in house. A local tire supplier performs tire mounts, dismounts, balancing and alignment. This is consistent with most California school districts, as tire repair is heavy work and can subject mechanics to potential industrial accidents.

The shop had been staffed with a lead mechanic and three additional heavy-duty mechanics. The lead mechanic position has recently been vacated. For a fleet of this size, there is no need for four mechanics. As noted above, two of the mechanics also possess a school bus certificate and frequently substitute on bus routes. This decreases the available time to perform vehicle maintenance.

Fleet

The district has 25 school buses for its 16 routes. Nineteen of the buses are generally for regular education bus routes; six are generally for special education bus routes. Three of the buses (#931, 933, 991) are parked and not used, but regularly maintained and certified by the CHP so they are available for future bus replacement grants. This is a positive strategy and one that many districts utilize to receive free, or nearly free, bus replacements. However, the district has more buses than necessary for the number of routes it operates, which increases the number of bus inspections and maintenance required for buses that are rarely used.

In addition to the buses, the district operates a non-school bus fleet (white fleet) that includes:

- 16 vans, pickup trucks and sedans assigned to the transportation pool that can be checked out by district employees for work-related travel or transporting student groups.
- 20 pickup trucks or vans assigned to the maintenance, operations and grounds departments.
- 4 vans or pickup trucks assigned to the food service department.
- 3 crew-cab pickup trucks assigned to the high school agricultural department.
- 2 autos assigned to the technology department.
- 27 electric carts or golf carts assigned to campuses and other district uses.
- A variety of mowers, string trimmers, edgers, blowers and other grounds equipment.

As noted above, many of these vehicles are not on a regular maintenance schedule. Several of the electric carts or golf carts are not operational. The fleet of electric carts or golf carts appears excessive for a district of this size.

Most buses have a wireless fidelity system (wi-fi) installed for students to access the internet while traveling to and from school. Bus rides are generally short, so it is not known how frequently students use this capability. Staff reported that the district has provided portable electronic devices for students to utilize for academic purposes that they can take home. The transportation department was not sure if that benefit was extended to all students or just high school and/or middle school students. The ongoing cost of this system does not appear to be invoiced to the transportation department. Most such systems cost approximately $2,500 for the equipment and up to $25 per bus, per month for satellite or cellular access.

Most buses also have a digital camera system installed. This assists with managing student behavior on the buses, as long as the systems are regularly checked and maintained.

The district does not operate a global positioning system (GPS) on its school buses. These systems can be utilized to perform electronic pre-trip inspections, record mileages, record student boardings, and interface with an electronic vehicle maintenance system. They also can assist drivers through live-time location recording, speed and bus stops. These features can be helpful in case of an emergency or a question regarding why a student was not picked up.

Facilities

There are two bus yards. The vehicle maintenance shop in Coalinga was reportedly built in the 1950s. It is still an excellent shop that would be the envy of any school district. It has offices, an employee break room, a small kitchen, restrooms, several in-ground vehicle lifts and an interior bus-wash room. Several other areas are no longer used, such as a paint booth, engine rebuilding room and a vehicle alignment pit. The disuse of these facilities is consistent with many school district shops. The environmental rules and equipment for vehicle painting are prohibitive. Most school districts do not have the volume or expertise to support engine rebuilding. Vehicle alignment equipment is expensive and is a specialty that is usually sublet to other providers.

The shop needs general maintenance and housekeeping. A lift in the steam-cleaning room was determined unsafe at FCMAT's visit in 2011. The district replaced it with a set of heavy-duty wheel lifts that perform the same function. The facility has not been painted in many years and

the pavement has deteriorated. The facility appears to be in compliance with placarding regulations for hazardous materials, storm water pollution prevention and the treatment of industrial waste.

The Huron facility has a small drive-through shop area, restroom, office, and bus parking area but is not staffed. As reported earlier, bus drivers go to Huron, check out their buses and drive their routes from that location. Bus and vehicle washing appears to occur here, but there is no approved separator sump to keep the dirty wash water from entering the storm drain system. There are some tools and equipment that could be used for minor repairs, but no mechanics regularly report to this location and no substantive maintenance could occur here. This building and an adjacent building contain grounds and custodial supplies for the staff and schools located in Huron. The buildings are unlocked, open, and unstaffed during the regular school day, which could encourage theft. Paint is severely deteriorated on the building, and the pavement has also severely deteriorated.

Recommendations

The district should:

1. Track and schedule preventive maintenance on buses when it is needed rather than on a set calendar rotation.
2. Develop a regular preventive maintenance program for all non-bus vehicles, and maintain vans that transport students to the same standard as school buses.
3. Evaluate the need for electric carts and golf carts.
4. Implement a work order system that assigns labor hours, parts costs and miscellaneous costs to every repair and can supply useful vehicle maintenance reports.
5. Clean shop and parts area, and surplus unneeded parts and equipment.
6. Ensure that state excise tax is not charged for diesel fuel.
7. Enable mechanics to diagnose electronic engines and vehicle components by providing technology and training. Inventory the mechanics' tools.
8. Develop reasonable fueling security measures.
9. Develop reasonable processes to approve parts and equipment purchases.
10. Consider reducing the overall number of school buses.
11. Consider purchasing and installing a GPS system on school buses.
12. Paint both bus facilities and pave both bus yards.
13. Secure and lock the Huron facility when employees are not present. Cease bus and vehicle washing at Huron.

Driver Training and Safety

School bus driver training in California is highly regulated. Prospective school bus drivers must receive a minimum of 20 hours of classroom training and 20 hours of behind the wheel training (E.C. 40080-40089) on curriculum developed by the CDE's Office of School Transportation. It takes approximately 35 hours to teach all of the classroom training units, and can take at least that amount for behind-the-wheel training. School bus drivers must receive a minimum of 10 hours of in-service training time each year. Only a state-certified school bus driver instructor can conduct the training (E.C. 40084.5). Behind-the-wheel training may be delegated to a behind-the-wheel instructor, which is another certification allowed by law and performed by the Office of School Transportation. The training must be meticulously recorded. In addition, school bus drivers must submit to a background check (fingerprinting) for licensing and for employment, and drug and alcohol testing in compliance with federal Department of Transportation rules (49CFR382). The previous transportation director performed driver training and kept the associated records in compliance with all laws and regulations. As reported previously, the department no longer has a state-certified school bus driver instructor.

The district lacks a Transportation Safety Plan in compliance with E.C. 39831.3. Each school must have a plan available for inspection by a CHP officer. A sample plan is included as Appendix D.

According to E.C. 39831.5, school bus emergency evacuation drills and student safety instruction must be performed annually and specific records kept for students in grades K-6. Also, specific safety information must be announced prior to every field trip. The transportation department is aware of these regulations but has not performed required evacuation drills and instruction for the 2017-18 school year.

The department reported a low incidence of bus accidents, and the bus fleet appears to reflect that experience with few dents or scratches on the buses.

Teachers and coaches drive small groups of students on district-owned passenger vans to school events. This is common throughout the state, and in compliance with CVC 545(b) (non-school bus vehicles designed for and seating no more than nine passengers plus the driver). The district enrolls each of these teachers or coaches in the Department of Motor Vehicles (DMV) pull notice program. The transportation department administers this program. The district does not enroll others who drive district vehicles in this program, such as maintenance, grounds, food service, agriculture department or information technology employees. This program sends the district annual reports of each driver's record and also sends a report when there has been activity on the driver's record, such as an accident, moving violation or other more serious violations, such as a drunk driving arrest or a license suspension or revocation. The transportation department ensures that each teacher or coach is enrolled in the program before driving students in a district vehicle that is checked out of the transportation department (some vehicles are parked at school facilities), and regularly reviews their driving records. The district may wish to consider enrolling all of these drivers in a drug and alcohol testing program similar to that of the school bus drivers.

Commercial drivers must be enrolled in a federally compliant drug and alcohol testing program. The transportation department oversees this program with a professional drug and alcohol testing consortium that keeps records and generates the random test lists. District officials reported that a positive test for a bus driver recently was concealed. The district is considering having the human resources department administer this program to ensure this does not reoccur.

The special education department does not provide in-service training for the school bus drivers. There are likely some non-severe special education students on regular education bus routes. The expertise of the district's special education department and their knowledge of the students that are transported lends itself to providing regular in-service training for the bus drivers. This training could focus on the behaviors that are common with certain disabilities and mitigation strategies on the bus, as well as common medical conditions.

Recommendations

The district should:

1. Secure the services of a state-certified school bus driver instructor to fulfill ongoing training needs. Consider selecting a current employee to become a state-certified school bus driver instructor to be utilized as needed.
2. Perform mandatory school bus rider safety instruction and evacuation drills.
3. Develop a Transportation Safety Plan in compliance with law.
4. Consider enrolling district staff that transport students in district vans in a drug and alcohol testing program administered by the Human Resources department.
5. Have the special education department provide regular training for bus drivers.

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Sample Custodial Handbook

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Absences/tardiness shall be deemed excessive when, in the judgment of the immediate supervisor, an employee's absence/tardiness results in a loss of efficiency and becomes detrimental to the operation of the Custodial Department. Factors used in this determination include but are not limited to absences on Mondays/Fridays, pre or post holidays, and comparisons to district wide averages.

Employee Dress Code

- The school district believes all employees are role models for students with whom they come in contact during and after school hours. Just as overall attitude and instructional competency contribute to a productive learning environment so do appropriate dress and grooming. All personnel are expected to present a professional impression in their dress and appearance as well as project an acceptable role model image for the students, which is not offensive to community standards or disruptive of the educational process.
- Jeans worn on Spirit Day will only be allowed when worn with school logo shirts.
- Staff shall not wear T-shirts, tank tops, shorts or sweat suits during school hours. The nature of assignments may require exceptions to this policy.

SAMPLE CUSTODIAL SERVICES DEPARTMENT POLICIES AND PROCEDURES

Call In Procedures When Absent Or Late For Work

To report an absence or delay, contact the Custodial Office and the school office. In the event of an unanticipated absence, employees must call and speak directly to their supervisor no later than sixty minutes (60) prior to the start of their shift. If their supervisor is unavailable, the employee must leave a voicemail message and number where they can be reached. The supervisor will then return their call. At times, a substitute custodian may be needed, so early notification is important. An indication of the projected length of absence should be given.

Absence of any kind must be recorded through the "Absence" system. Using your Human Resources issued ID and Pin number, employees must document absences via the phone or the Internet, no later than the day of the absence. Upon returning to work, custodians must provide the school Site Administrator, Manager of Custodial Services, and the Supervisor of Custodial Services the "job number" issued from the "Absence" system.

Responsibility for Keys Issued

Each custodian will be issued keys for the school or schools of their assignment. Keys should not be left unattended or loaned to anyone. If keys are missing at the end of the shift, the custodian should conduct a search of the assigned work areas. If unable to locate the keys, the school Site Administrator, the Supervisor of Custodial Services, the Manager of Custodial Services, and the Manager of Maintenance should be notified immediately. If keys assigned to the employee are lost, the employee will be responsible for all replacement costs to the district.

SAMPLE CUSTODIAL EQUIPMENT OPERATION TRAINING

Back Pack Vacuum

Operating Instructions

1. Preparing vacuum for use:
    a. Attach flex hose, wand and swivel head to the vacuum canister.
    b. Make sure that filters are in place (motor filter and exhaust filter).
    c. Install cloth bag along with a paper filter bag.
    d. Loosen the shoulder straps and waist belt. In an open area, lift the vacuum by one shoulder strap and slide your free arm into the other strap.
    e. Fasten the waist belt snugly and make sure the weight is resting conformably on your hips. Note: The back plate is adjustable up or down by removing the four .. screws that attach to the vacuum's body.
    f. Adjust shoulder straps so that the vacuum is loosely centered and balanced on the waist belt. The shoulder straps should not be supporting the weight of the vacuum; rather they should support the vacuum from tilting backwards or sideways.
    g. Place the extension cord between the waist belt's strap and padded area to signal you if you have run out of cord while vacuuming.
2. Extension cord care:
    a. Never stretch the cord tightly between the vacuum and the outlet. A cord that is stretched or pulled will not function properly and creates a danger.
    b. After vacuuming, unplug the cord at both ends and wind it up loosely, starting from the vacuum out to the plug. Do not wind the cord up by wrapping it around your hand and elbow.
3. Proper vacuuming motions:
    a. For large open areas, begin with the wand parallel to your body.
    b. Draw the top of the wand in toward your waist and twist at the waist walking backward or forward (a side to side motion).
    c. The motion is similar to mopping and keeps the upper body and arms from tiring.
    d. Avoid bending over or picking up items from floor with vacuum on. Keep back straight and bend at the knee when vacuuming low areas.
4. Ergonomics:
    a. The weight of the vacuum should be carried on the operator's hips and be evenly distributed.
    b. The padded waist belt and shoulder straps are adjustable for a custom fit.
    c. The back plate is ventilated to keep the operator cool.
    d. The on/off switch is conveniently placed on the waist belt for easy access.

   e. Use the proper attachments for the job. Pro-Team has attachments to perform most jobs without requiring that the operator bend over or get into difficult positions.
5. Caring for your backpack vacuum:
   a. Every time you finish vacuuming, shake out the cloth and micro-lined filter bags.
   b. Each week, rinse, dry and return the foam/filter diffuser to the bottom of the vacuum below the motor.
   c. After each shift, wipe the inside and outside of the vacuum with a household cleaning agent.
   d. Check the filter bags each and every time you start and finish vacuuming. A clogged and dirt filter bag restricts airflow and results in reduced suction and overheating.
   e. Stop after vacuuming three or four rooms or as needed to shake out the micro-lined bag, especially if it is full.
   f. Wash and line dry the cloth filter bag as necessary.
   g. Once a week, remove the motor and exhaust filters and rinse and air dry. Then return to original locations.

Safety Instructions

1. Do not leave any backpack vacuum plugged in when it is not in use. Unplug it from the outlet when the unit is not in use and before servicing.
2. Do not use outdoors or on wet surfaces.
3. Do not use a damaged cord or plug. If the unit is not working, as it should, call the Custodial Supervisor.
4. Do not pull or carry the vacuum by the cord or use the cord as a handle. Do not close a door on the cord or pull the cord around sharp edges or corners. Do not run over the cord. Keep the cord away from heated surfaces.
5. Do not pull on the cord to unplug. Grasp the plug at the outlet and pull.
6. Do not handle the plug or vacuum with wet hands.
7. Do not put any objects into openings.
8. Keep hair, loose clothing, fingers, and all parts of the body away from openings and moving parts. Long hair should not hang over or near the unit.
9. Turn off the unit before unplugging.
10. Do not use without the micro-lined filter bag, cloth filter bag, dome filter, and foam diffuser in place.
11. Do not try to recover any liquid with this vacuum. This vacuum is for dry recovery only.
12. Connect to a properly grounded outlet only.

Floor Scrubbing Machine, Swing Type

Operating Instructions

1. To attach brush, tilt machine back so that the bottom of the machine is exposed. Position the brushes three slots over the three lugs of the drive plate.
2. Adjust handle height to the correct height for the operator.
3. To start machine, hold handle with both hands and depress start lever.

4. This machine is designed to move from side to side. To guide right, raise the handle slightly. The higher the handle is raised, the faster the machine will move to the right. Conversely, to guide left, lower the handle. The more the handle is lowered, the faster the machine will move to the left.
5. When storing your floor machine, always remove the pad and brush.
6. Cord should be held over shoulder to keep the cord out of the path of the machine.

Safety Instructions

1. Never try to attach brush when motor is already engaged.
2. Never turn on machine with handle in locked upright position.
3. Do not leave a plugged in machine unattended.
4. Never plug machine into wall socket that is not grounded.
5. Never plug power cord in with wet hands.
6. Never plug power cord into wall with the balance of the cord wrapped around the handle and switch lever.
7. Never let an inexperienced person operate the machine without proper instructions.
8. Never us an extension cord that is of a lesser gauge wires then that of the machine cord.
9. Never put weights on the floor machine to increase the scrubbing effect.
10. Never run the machine towards the power cord.
11. Never use a cord that is damaged or taped.
12. Never run scrub machine without a scrub pad or brush.
13. When moving machine from room to room, never rest machine in an upright position with pad in place.
14. Always unplug machine before putting drive block on, or working on machine.

SAMPLE CUSTODIAL DEPARTMENT SAFETY

Rules for Safe Lifting

1. Ask for help in lifting heavy or bulky objects.
2. Do lifting with strong leg muscles by bending the legs when lifting instead of bending the weak back muscles.
3. Face load squarely and be sure to have firm footing.
4. Do not allow load to slip while lifting. If it does, stop and start over with a firm grip.
5. Keep the load close to body.
6. Change the position of feet to make a turn but do not twist body.
7. Avoid blocking vision.
8. Use lifting belts when available.

Ladder Safety

1. Use a ladder instead of standing on chairs, tables, boxes or cans.
2. Never paint a wooden ladder.
3. Ladders should not be set too straight; one fifth of the ladder length away from the bottom is a good rule.
4. It is dangerous to lean too far when on a ladder.
5. The legs of a ladder should be fully extended and the spreader set before a stepladder is used.
6. It is dangerous to try to use a stepladder as a straight ladder.
7. Always ascend and descend a ladder facing it.
8. Do not use the top step of a ladder to stand on.
9. Do not leave an item on the top of a ladder, which is unattended, or being moved.
10. Be very cautious carrying a ladder approaching doors and corners.
11. Select the right ladder for the job.

SAMPLE CLEANING METHODS

Classroom Cleaning

Most of the custodian's time is spent in the cleaning and caring of classrooms. The key to cleaning classrooms is to establish a procedure that you will follow and divide the cleaning into three parts:

Daily Cleaning Duties:

- Vacuum or sweep the floor
- Dump the wastebaskets
- Empty the pencil sharpener
- Clean sinks if applicable
- Check dispensers for paper and soap supplies
- Check doors and windows for security
- Toilet (if the classroom has restrooms)
- Drinking fountains
- Watch for maintenance items and report to supervisor
- Turn out lights

Weekly Duties:

- Dust horizontal surfaces (Monday)
- Spot clean doors and walls and, if applicable, door glass (Tuesday)
- Clean table tops (Wednesday)
- Clean counters, spot carpets (Thursday)
- Clean whiteboards and trays (Friday)

Special-cleaning Duties on Non-Student Days:

- Bonnet carpets (See Carpet Care Section)
- Clean furniture
- High dust.
- Clean all windows; inside and out.
- Restore floors

Equipment and Material Needed

Equipment:

- Rubber gloves and goggles
- Putty knife
- Dust pan
- Counter brush
- Dust cloth
- Micro-fiber dust cloth
- Sponge or towel rag
- Spray bottle
- Treated dust mop and handle

- Equipment carrier
- Toilet cleaning equipment (see Restroom Care)
- Mop, bucket and wringer
- Vacuum cleaner
- Dry soft clean towel for white board cleaning
- Melamine foam pads to clean furniture and walls
- Small scrub / sponge pad
- Extending duster

Materials:

- Paper products and liquid soap
- Liners
- All-purpose cleaner
- Disinfectant
- Carpet spotter
- Glass cleaner
- Furniture polish
- Cream cleaner or scouring powder (sinks only)
- Graffiti cleaner if needed
- WD40
- Gum remover

Job Method

- Obtain necessary equipment, materials and supplies.
- Proceed to assigned work area.
- Empty wastebasket and pencil sharpener into large plastic bag and place in corridor when full for removal.

Precaution:

- Replace wastebasket to original place. Do not leave on furniture.
- In order to prevent possible injury or exposure to blood borne disease, empty waste paper baskets directly into the bag without handling the contents. Never reach into a trash container.
- If trash has evidence of blood or body fluids, tie the liner off and replace with a new one.
- Always wear rubber gloves when dumping or handling trash.

Sweeping Tile Floors:

- During sweeping operation, carry a putty knife to scrap gum or other foreign materials from the floor.
- Sweep floors with treated dust mop/ or backpack vacuum with proper floor tool, sweeping corners. Move all student chairs and other easily moved furniture.
- Use the counter brush (or broom) and dustpan to pick up all loose sweepings.
- When sweeping/vacuuming the floor, start in the far corner and work toward the door.

- Periodically, shake or brush the dust mop during use as needed. (See Equipment Section for care of dust mop.)
- Spot mop floors as necessary.

Carpeted Floor Care:

- Clean entry mats by vacuuming or shaking out.
- Vacuum the floor with the largest practical tool.
- Make sure to vacuum under counters and bookcases.
- Reset furniture as you vacuum.
- If you see gum, spray with freezing product or alternate gum remover and scrap up with putty knife.
- If carpet develops loose ends, cut them off to prevent running.

If the room has sinks and restrooms, be sure to clean as directed in the Restroom Section of this book.

Dusting, Wiping and Polishing:

Dusting room with a treated cloth

- Dust all horizontal surfaces once a week.
- Make sure to flip the cloth often to have clean cloth to work with
- Start with highest surface that can be reached while standing on the floor and work downward.
- Watch for file cabinets, door panels, louvers, bookshelves, audio and visual equipment.
- Watch for cobwebs.
- Dust above doorframes and all vents.

Damp Wipe or Clean:

- With all-purpose cleaner, spot clean doors and walls.
- Use glass cleaner on all glass surfaces including door glass, mirrors, windows, fire extinguisher fronts and glass desk covers.
- Wear proper protective equipment while using all chemicals.

Cleaning Furniture:

- Use all-purpose cleaner (usually a degreaser), abrasive pad (blue power pad) and some type of toweling. **Note: green scrub pads will scratch some surfaces.**

Clean graffiti daily:

- Clean all desktops weekly.
- Clean tabletops in kindergarten area.
- Do not use graffiti remover unless necessary.
- Rules for removing graffiti:
    - Use all-purpose cleaner (degreaser)
    - Use orange-based natural products
    - Use graffiti remover

Clean Counters:

- Spray counters with disinfectant if close to sink and made of Formica or ceramic tile.
- Wipe with a clean towel.
- If the counters are stained wood, use polish and wipe with dry cloth.
- Use proper protective equipment when working with chemicals.

Carpet Spotting:

- Always use all-purpose spotter first. These spotters will generally remove about 90% of all stains and are safe for most carpets.
- Spray before vacuuming to allow the chemical to work.
- After vacuuming, brush out the spot using the spotting pad with handle.
- If the carpet has more than five to ten spots, you need to schedule a time to bonnet clean the carpet.
- For more information on carpet cleaning, see the Carpet Cleaning Section.

Cleaning White boards and trays:

- First, erase the entire board with a felt eraser (unless the board is marked "Save" or by prior approval of your supervisor).
- In cleaning a white board, erase with a white board eraser, and then wash with glass cleaner and a dry soft towel or a micro fiber cloth. Use caution with white board cleaners, as they tend to be toxic.
- Clean trays moving erasers and pens for complete cleaning.

Cafeteria Cleaning

One area of cleaning that requires special attention is the cleaning of the area(s) used to serve student lunches as well as the food preparation area. These areas need special care because they must be kept clean and sanitary or illness could result. Our goal will always be to exceed local and county regulations. We want all people who use our facilities to feel that using our buildings will not endanger their health.

These buildings are also used for performances; thus, we must do all we can to keep them neat and clean for public use. We want that clean look to be the standard that we live by.

What the Job Entails:

- Set the room up for lunch including putting tables down, putting out trash containers with liners, setting up serving tables if needed, and providing cleaning solution if necessary for use in cleaning tables.
- If the patio area is used, set out trash containers and cleaning solution if necessary.
- Make sure you have a mop bucket, mop and wringer ready for use in case of spills. (These should not be visible to students or placed in the food prep area)
- Be available in the area or let the lunch period monitors know where you

will be in an emergency.
- After each lunch, dump all trash in the proper containers and replace liners if necessary.
- After the last lunch, clean the Multi-Purpose Room.
- Clean patio area.
- Clean serving kitchen and restroom if necessary.
- Clean restroom if there is one in the kitchen.

Equipment Needed:

- Trash containers.
- Putty knife.
- Dust pan and maid's broom.
- Push broom.
- Sponges toweling and bucket of soapy water.
- Large treated dust mop.
- Mop and bucket with down-press wringer.
- Equipment carrier.
- Cleaning pads (white and green).
- Spray bottles.
- Rubber gloves and goggles.
- Bucket with disinfectant.
- Toilet bowl mop and brush.
- Long handled utility brush (nylon)
- Automatic floor cleaning machine.

Supplies and Materials Needed:

- Paper products (paper towels, toilet paper, liquid hand soap and seat covers).
- Multi-purpose cleaner (degreaser).
- Plastic liners (large and small).
- Quaternary disinfectant cleaner
- Glass cleaner.
- Neutral cleaner for floor mopping and cleaning of tables.

Job Method:

- After each serving of food, clear and help clean tables for next group to come in. You may have up to three-lunch groups come in.
- Make sure that the trashcans are emptied for the next group coming in.
- Spot clean the floor and spot mop spills as they happen using a solution of 1 to 64 (2 ounces to the gallon) mixture of neutral cleaner and water.
- After lunch has been served to the last group, begin to clean and put the tables away. If you have in-wall tables, clean the pockets they sit in as needed. Also, check under the tables for milk or juice cartons left by students. If you don't check, when you close the tables, they will be compressed.
- Move the trash containers to the back of the room then sweep the entire room making sure to use the largest dust mop feasible, usually at least 42". If you see a wet spot, go around it. If you get your mop wet, it becomes

very hard to push. Sweep all the debris into a pile using your maid's broom and dustpan. Place in a trash container.

- Mop the entire floor using a well-wrung mop to allow for proper cleaning and quick drying. Note: You clean the floor first to allow for school usage as soon as possible after lunch. (Sites with an auto scrubber should be used as per the manufactures instructions, recommended dilution rates, and speed)
- Empty all trash containers and clean out the trashcans leaving them upside down to dry. You can clean the container with a bucket of degreaser and a long handled brush.
- If the patio is used for lunch, clear the tables first and then clean and sweep the area around the tables.
- Remove the trash and clean as above.
- Hose down with a pressure washer if it is available, hose down tables at the same time the patio area as needed. Note: If you use the patio area for serving food, you will want to seal the concrete with a concrete seal yearly.
- Clean the kitchen starting with the sinks.
- Clean restrooms, if applicable, by the system presented in this book.
- Sweep the floor and remove all trash to the proper container. Note: To conserve space in your large trash receptacle, make sure to break down all boxes so that they take less space. (These are also easy to recycle.)
- Mop floor using the same procedure as on the Multi-Purpose Room.
- Report maintenance and safety issues to your supervisor.

Scrubber, Automatic:

- Flush and clean both tanks after each usage. Clean brushes and pads along with drive block.
- Wash down the exterior and interior of the machine. Clean the squeegee and rim so that the rubber remains soft and flexible.
- Check batteries and clean if needed.
- Make sure the vacuum cover and the rubber gasket have been clean make sure to allow tank to dry before replacing the cover on the vacuum side.

SAMPLE SCHEDULES

Night Custodian (Elementary)

NIGHT SCHEDULE CUSTODIAN SCHEDULE
3:00 P.M. - 11:30 P.M.

The cleaning of restrooms will include:

- Checking dispensers for paper products and liquid hand soap,
- Sweeping floors
- Dumping trash,
- Cleaning sinks
- Cleaning toilets and urinals **(paying close attention to cleaning under the rim and lip of toilets and urinals)**,
- Cleaning mirrors, damp mopping floors daily **(paying close attention to borders and behind the doors)**,
- Dust weekly.
- See detailed cleaning and serving procedure.

3:00 P.M. - 4:30 P.M	Clean C-1, 2, 3, 4, 5, and rest rooms in that pod
4:30 P.M.- 4:50 P.M.	Clean rest rooms in D pod
4:50 P.M. - 5:00 P.M.	Secure buildings
5:00 P.M. - 5:15 P.M.	Break
5:15 P.M. - 7:00 P.M.	Clean D-1, 2, 3, 4, 5,. And rest rooms in that E Pod
7:00 P.M. - 7:15 P.M.	Break
7:15 P.M. - 9:00 P.M.	Clean E-1, 3, 3, 4, 5,and F-1
9:00 P.M. - 9:15 P.M.	Break
9:15 P.M. – 11:15 P.M.	Clean F-2, 3, 4, 5, G-1, 2, and restrooms in restrooms in F and G
11:15 P.M. – 11:30 P.M.	Secure buildings, restock cart, and put tools away

In cleaning of classrooms, the following will hold true:

Daily:	Sweep or vacuum floors, dump trash, empty pencil sharpener, clean sinks if applicable, check vacuum bag daily, empty disposable vacuum bag when half full
Monday:	Dust all horizontal surfaces including counters.
Tuesday:	Clean chalk trays, windows and doors as time allows.

Wednesday:	Clean furniture.
Thursday:	Clean sink counters and spot carpets.
Friday:	Clean white boards and trays,

Approved: _____
Supervisor Date

I have read, understood and received a true copy of the cleaning schedule outlined above.

Approved: _____
Employee Date

PERFORMANCE INSPECTION GUIDE

Basic Guide

Trash Removal:

- All wastebaskets should be empty, in place, clean and ready for use.
- All trash placed in the dumpster nightly.

Sweeping and Vacuuming Cleaning:

- There should be no dirt left in corners, under desks or behind doors.
- There should be no dirt left where sweepings were picked up.
- There should be no trash or debris under desks, tables and chairs.

Dusting:

- There should be no dust streaks on desks or office equipment.
- Corners and crevices should be free from any dust and dirt.
- There should be no oily spots or smudges on walls or glass.

Damp Wiping:

- Mirrors, window blinds and door glass.

Carpets:

- Carpets should be thoroughly clean and free from dust, dirt and debris.

Wash Basins and Toilets:

- Wash Basins and toilets should be clean and bright.
- Walls near washbasins and toilets should be free from spots and smears including partitions.
- Floor freshly mopped and not left with excess water.
- All metal fixtures wiped dry.
- All dispensers filled.

Cleaning Standards Defined

The purpose of this section is to offer a definition of ***"what is clean."*** Once, "what is clean" has been determined then supervisors and employees know what is expected of them. We have attempted to keep things as simple as possible, using only four categories to evaluate work done in several cleaning tasks. The four categories are listed below. How they are used to evaluate the work done in several cleaning tasks follows. You will also find forms at the end of the section meant as an aid for inspecting custodial areas.

1. **Unacceptable.**
2. **Needs Improvement.**
3. **Meets Standards.**
4. **Exceeds Standards.**

Measurement Tools

Classroom, Office, and Library Cleaning Measurement

Sweeping/Dust Mopping/Vacuuming of Hard Surfaces

1. Area not swept, no evidence of effort.
2. Some effort shown, dust and bits of paper still visible.
3. Floor acceptable, accessible areas dust free.
4. Corners clean, furniture moved and area underneath cleaned, room free of visible dust.

Mopping (spot) Classrooms and Offices

1. Full of spots and marks.
2. Some spots cleaned but visible soil remains.
3. Acceptable, looks as if most visible soil has been removed.
4. No visible soil or residue buildup.

Vacuuming

1. Not vacuumed, littered, no evidence of effort.
2. Some effort made, litter and dust still remain.
3. It is teachable, no buildup, most litter gone.
4. No buildup, no visible litter or grass, edges are clean.

Spots and Stains

1. Very heavily stained and spotted, no effort shown.
2. Some effort shown, not all spots removed, some remain.
3. Maximum effort shown, very few spots remain.
4. Spotless, no visible spots or stains.

Whiteboards and Trays

1. Trays loaded with dust, writing still visible.
2. Whiteboard looks cleaned, writing still visible.
3. Acceptable, clean, no visible writing.
4. No ghost writing, trays dust free, boards very clean.

Counters

1. Very dusty, soiled, no evidence of effort shown.
2. Some effort showed not clean, dust and soil very visible in areas.
3. Acceptable, dusted, existing spots extremely light.
4. No visible dust or soil, evidence of extra care to preserve the surface.

Doors

1. Very heavily soiled, no effort of cleaning visible.
2. Some effort shown, but not clean.
3. Acceptable, free of most soil.
4. Spotless, free of all soil and marks.

Furniture

1. Heavily soiled, marks all over, no effort shown.
2. Fingerprints present, some dirt buildup still present, some effort shown.
3. Acceptable, clean but no shine.
4. No visible dust or soil shows that extra effort, shiny.

Glass

1. Glass very dirty, visibility impaired, not cleaned for quite some time.
2. Glass needs cleaning, fingerprints and dust visible.
3. Glass slightly dusty, free of fingerprints, looks fairly clear.
4. Glass dust free, visibility excellent, appears to be recently cleaned.

Sinks

1. Sinks very dirty, ledges show caked soap deposits, bright work dull and dirty, no evidence of effort.
2. Some effort shown, looks dirty, no long term buildup.
3. Sink clean, no buildup, top and bright work clean but no shine.
4. Sink very clean, high luster indicates super effort.

Dispensers

1. Shows no effort, dispensers dirty, empty.
2. Shows some effort, paper low but not empty, dispenser dirty, lever dirty, fingerprints on dispenser.
3. Acceptable, looks clean, dispenser filled.
4. No visible soil, dispenser maintained like new.

Walls

1. No effort shown, heavily soiled.
2. Effort shown, but spots and writing remain on walls.
3. Acceptable, free of most soil and writing.
4. Spotless, free of soil and marks.

Window Sills

1. Heavily soiled or dusty, no effort shown.
2. Some effort shown, dirt still in corners, streaked, most buildup cleaned.
3. Acceptably clean, but no real shine.
4. No visible soil or dust, shiny, extra effort made.

HVAC Vent Covers

1. Very dusty, soiled, no evidence of effort shown.
2. Some effort showed, not clean, dust and soil visible in areas.
3. Acceptable, dusted, existing spots extremely light.
4. No visible soils, evidence of extra effort made to clean the surface.

Restroom Cleaning Measurement

Dispensers

1. No effort showed dispensers dirty, empty.
2. Some effort showed paper low but not empty, dispenser dusty, lever dirty, fingerprints on dispenser.
3. Acceptable, looks clean, dispenser filled.
4. No visible soil, dispenser maintained like new.

Doors

1. Very heavily soiled, no effort at cleaning visible.
2. Handles and bottom of door not cleaned, fingerprints.
3. Acceptable, free of most soil.
4. Spotless, free of all soil and marks.

Floors

1. Littered, soiled, and showing no effort at cleaning, strong odor present.
2. Showing some effort, boards and corners not clean, floor streaked, slight odor.
3. Acceptable, floor mopped evidence of effort, no odor.
4. Spotless, no signs of soil, no odor.

Mirrors

1. Very dirty, soap and water buildup, no effort at cleaning.
2. Most buildup removed, streaks, spots, dusty, shows some effort.
3. Acceptable, free of most soil and spots, some hazing.
4. No visible soil, it has bright shine.

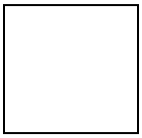
Partitions

1. Heavily soiled, graffiti, dusty.
2. Shows some effort, dust, fingerprints, and some graffiti visible.
3. Partitions generally clean, most graffiti cleaned, recently dusted.
4. Partitions very clean, free of soil, spots, and marks.

Sinks

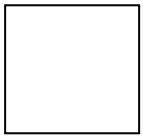
1. Sinks very dirty, ledges have buildup, bright work dirty, shows no effort.
2. Shows some effort, residue present, bright work looks dull, not cleaned properly.
3. Sinks acceptable, little evidence of dirt in bowl or on surfaces.
4. No visible signs of soil, fixture has high luster.

Toilets



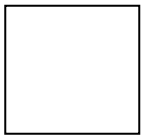
1. Toilet very dirty, scum lines, streaked, stains, deposits under rim, seat dirty, bright work dirty, strong odor.
2. Waterline present, some streaks, some odor, shows some effort.
3. Toilets acceptable, seat and sidewall clean, scup line almost completely gone, very little odor, exterior clean.
4. Toilets very clean, surface has high luster, no odor.

Urinals



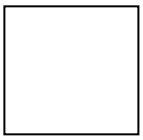
1. Urinals very dirty, walls stained and streaked, water deposit and buildup inside rim, has odor, shows no effort at cleaning.
2. Shows some effort, odor present, no long term buildup, and evidence of cleaning present.
3. Acceptable, walls almost streak free, little or no buildup.
4. Very clean, has no streaks or buildup, lustrous look, no odor.

Walls



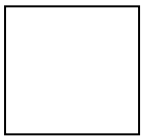
1. Shows no effort at cleaning, heavily soiled.
2. Some cleaning, but walls still have visible soil and fingerprints.
3. Acceptable, free of most soil and writing.
4. Spotless, free of all soil and markings.

Waste Receptacles



1. Very dirty inside and out, not emptied, no liner.
2. Slightly dirty inside and out, trash emptied but liner dirty.
3. Acceptable, fairly clean inside and out, has clean liner.
4. Spotless, cleaned inside and out, clean liner.

Lockers



1. Very dusty, soiled, no evidence of cleaning.
2. Shows some effort, but dust and soil still visible.
3. Acceptable, dusted, existing spots extremely light.
4. No visible soil or dust, extra effort and care taken to clean surface.

Appendix B

This Agreement is made between the Placer Union High School District, hereinafter referred to as "District," and XXX, parent of XXXX, hereinafter referred to as "Parent."

District is a school district in the County of Placer, State of California, and has its principle place of business at 13000 New Airport Drive, Auburn, California, 95603.

Elena DalFavaro, Coordinator of Certificate Bound Programs, and parent have discussed and agreed that it is in the best interest of the child, and the PUHSD to maintain the past arrangement Parent had with Placer Hills Union School District and reimburse Parent for the transportation of their child to and from the bus stop or school.

1. **Term:** This Agreement shall commence on **XXXXXX, 2012**, and shall continue until **XXXXX, 2013.** This Agreement may be terminated by either party with Sixty (60) day's written notice to the other party. Should there be a material breach in this agreement, this contract may be terminated with ten (10) day's written notice to the other party.
2. **Services:** Parent has agreed to transport their child from their residence to the school bus transfer stop at the Raley's shopping center located at 13384 Lincoln Way, Auburn CA. In addition, when District school bus transportation is not scheduled to operate, but the child's school is in session, Parent shall transport their child to and from their residence to the Placer Learning Center (PLC) located at 5477 Eureka Rd. #2, Granite Bay, CA 95746.
3. **Expenses:** Parent shall be responsible for all expenses and provide all the necessary equipment, supplies and/or materials necessary to render services pursuant to this Agreement. Parent agrees at all times to comply with all applicable ordinances, laws, and regulations as they relate to the execution of this Agreement
4. **Fee:** For the services rendered pursuant to this Agreement, Parent shall be entitled to reimbursement for the cost of transportation based on the current (2012) IRS per mile reimbursement rate of $ 0.555. Parent shall be paid within 4 weeks after receipt, and District approval, of the mileage reimbursement request form (attached).
5. **Licenses:** As an independent contractor, it shall be the sole responsibility of Parent to maintain the appropriate California Driver's License and automobile insurance as required by law.
6. **Insurance and Taxes:** Parent shall be an independent contractor and not an agent or employee of District under this Agreement. District shall not withhold or set aside income tax, Federal Insurance Contributions Act (FICA) tax, unemployment insurance, disability insurance, or any other federal or state funds whatsoever. It shall be the sole responsibility of Parent to account for all of the above liabilities.
7. **Indemnification & Hold Harmless Agreement:** The District and Parent hereby respectfully agree, to the fullest extent permitted by law, to indemnify, defend and hold harmless the other party and its board of trustees, officers, agents, invitees and employees from and against any and all claims, costs, demands, expenses (including attorney's fees), losses, damages, injuries and liabilities arising from any accident, death or injury whatsoever or however caused to the other Parties person or property, due to, arising out of, or related to the negligence of the other Party.
8. **Entire Agreement:** This Agreement supersedes any and all other agreements, either oral or in writing, between the parties hereto with respect to the subject matter hereof, and no other agreement, statement or promise relating to the subject matter of this Agreement which is not contained herein shall be valid or binding.

Douglas Marquand, Placer Union High School District — Date:

Parent Name and Signature — Date:

Parent Address — Phone Number — E-mail

The Placer Union High School District, an equal opportunity workplace,
is committed to student learning by providing teaching excellence in a supportive environment.

Consortium Member District Letterhead

TRANSPORTATION AGREEMENT
(For contracting with Parents or Guardians)

THIS AGREEMENT is entered into this Date:_____, between *district*, hereinafter called the District, and Parent hereinafter called the Contracted for (Student Name) 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 56030-5640 or 56300-56367; and
WHEREAS, it has been determined that the Contracted will transport the Pupil to and from ( ) for the 2009-2010 school year.

NOW THEREFORE the District and Contracted hereby agree as follows;
The District shall reimburse the Contracted for the transportation of the Pupil to and from the school the sum of the current IRS mileage rate payable upon presentation of an itemized mileage report to the District Business Manager. Payment shall be made as soon as possible in the month succeeding that in which the transportation was performed.

Total number of miles per day to be reimbursed will not exceed ( ). It is expressly understood and agreed to by both parties that the Contracted, while performing services under the Agreement, is an independent contracted and is not an officer, agent, or employee of the District.

The Contracted 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 Contracted, its agents or employees. Proof of automobile insurance shall be presented to the Business Manager prior to completing this contract.

Service under this Agreement shall commence on ( ) and shall terminate on ( ) . Inclusive, unless terminated sooner. **Reimbursement forms to be submitted monthly.**

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

District	CONTRACTED
By _____	By_____
Title_____	Title_____
Date_____	Date_____

Appendix C

☐ Special Education
☐ 504
☐ No Child Left Behind

Poway Unified School District
Special Education
13626 Twin Peaks Road, Poway CA 92064

☐ Start _____
☐ Change _____
☐ Continue _____

TRANSPORTATION REQUEST

PLEASE PRINT CLEARLY

Student Name	Parents Name	Home Phone	Work Phone	Cell Phone
Address	Apartment Name and number	TRANSPORTATION REQUIRED		
City	Zip	SCHOOL HOURS From	To	YES
Name of Special Program	Birthdate / Grade			** HOME-SCHOOL-HOME ..... ☐
School	Address	School Phone Number		HOME-SCHOOL-SITTER ..... ☐
				SITTER-SCHOOL-HOME ..... ☐
				SITTER-SCHOOL-SITTER ..... ☐
				HOME TO SCHOOL ..... ☐
				SITTER TO SCHOOL ..... ☐
				SCHOOL TO HOME ..... ☐
				SCHOOL TO SITTER ..... ☐

YES	NO	FACTORS AFFECTING TRANSPORTATION	EXPLANATIONS
		CAN WALK TO/FROM A DESIGNATED BUS STOP ☐ Gated Community/Apartment Complex may not be accessible.	
		Wheelchair dependent	
		Walker dependent	
		Requires assistance loading/unloading	
		Safety Vest	
		Special Aide/Nurse required	
		Must be met at Residence or School	
		Possible Problem with other children	
		Diabetic	
		Subject to Seizures	
		Requires Medication	
		Special Equipment	
		Oxygen	
		Trach/Gast Tube	
		Restraints	
		Suction machine	
		Other	
		Other	

Name of Sitter
Address
City
Name of Responsible Party for Release

REASON OR TRANSPORTATION
☐ Placement away from Home School ☐ Student Disability

_____ _____
Signature (Special Education/Health Services) Date

PARENTAL RELEASE SIGNATURE

I AGREE TO HOLD HARMLESS AND INDEMNIFY THE POWAY UNIFIED SCHOOL DISTRICT, ITS EMPLOYEES, AND ITS AGENTS FROM ANY CLAIM OR DEMAND WHICH MAY BE MADE BY REASON OF MY AUTHORIZATION TO ALLOW MY CHILD TO WAIT FOR AND/OR LEAVE THE SCHOOL BUS AT A PREARRANGED LOCATION.

_____ _____
Parent Signature Date

EMERGENCY POINTS OF CONTACT AND RESPONSIBLE PARTIES

IN CASE OF EMERGENCY, OR IF WE ARE UNABLE TO DELIVER YOUR CHILD TO YOU WE WILL ATTEMPT TO CONTACT THE FOLLOWING PEOPLE YOU DESIGNATE AS EMERGENCY POINTS OF CONTACT. IF WE ARE STILL UNABLE TO DELIVER YOUR CHILD, WE WILL DELIVER YOUR CHILD TO EITHER THE; POWAY SHERIFFS DEPARTMENT OR SAN DIEGO POLICE DEPARTMENT FOR SAFE KEEPING.

Name	Relationship	Telephone	Name	Relationship	Telephone

TRANSPORTATION USE ONLY

EDU LOG NO.	AM STOP NO.	PM STOP NO.

T-7A (rev 9-09) Distribution: WHITE- Transportation YELLOW- Speced Cum File PINK- Parent

Appendix D

WEST COUNTY TRANSPORTATION AGENCY

TRANSPORTATION SAFETY PLAN FOR SCHOOL PERSONNEL

This Transportation Safety Plan contains procedures for school personnel to follow to ensure the safe transport of pupils and is in compliance with Education Code Section 39831.3. It must be physically present at each site where school transportation is provided and available for inspection by any member of the California Highway Patrol.

HOME-TO-SCHOOL TRANSPORTATION PROVIDER

West County Transportation Agency is a public, Joint Powers Agreement or Agency formed by your school district or contracted by your district to provide safe, child-centered, economical and coordinated school transportation service for you. The information in the following paragraphs is intended to assist school personnel in their task of providing safe transportation.

Students shall receive a packet of school transportation safety and ridership information at least once when they are enrolled in school (Education Code Section 39831.5). The parent packet of school bus safety information is included in this plan and is updated annually and must be included in the district's back to school parent information. A district may supplement this information based on additional procedures adopted locally, but may not remove anything. If there are additional procedures, the District shall share that information with WCTA. Most of this same information is presented below so school personnel may include this information in their daily contact with students, may utilize this in answering questions for students or the public, or teachers may utilize this in developing instructional lessons for school transportation safety.

BUS ROUTES

Regular home-to-school bus route schedules are delivered to school offices several weeks prior to the beginning of the school in August. Although bus routes and stops change infrequently, occasionally notices are sent to schools or given directly to students. Any questions regarding any revised bus schedules should be directed to the Dispatchers at West County Transportation Agency. Routes are identified by a number. That number is located next to the entrance door on each bus. Students need to have a designated school bus stop, and any student who wishes to ride another bus or travel to a different bus stop must have a signed permission note from a parent. Students without such a note will be allowed to leave the bus at their regular stop only, or will be returned to school. If there is not a bus stop located in close proximity to a student's home, one may be established by calling West County Transportation Agency at 707-206-9988 x19.

Students newly enrolling in school shall be assigned a bus stop by a School or Agency official. Special education students are assigned their bus stop location when service is requested. WCTA schedulers will notify the family of the bus stop location before service begins. Regular education students are issued a bus pass that identifies the location of the bus stop that is assigned for that student. The bus pass shall be carried with the student at all times.

Students are urged to get to the bus stop at least five minutes prior to the posted stop time. Bus stop times may slightly change or vary depending on ridership changes made in the first couple of weeks of school. Drivers make a point to notify students and parents of any changes. Buses never leave the bus stop location prior to the posted time.

Students must remain orderly at the bus stop, must remain at least twelve feet back of the main traveled portion of the roadway and should be visible to the driver. Students must be respectful of property-owners where the bus stop is located, must keep their voices down and keep off of the property.

School staff should assist student bus riders particularly the first couple of weeks of school by reviewing the bus they are to board at the end of the day, identifying that on a temporary name tag, and walking out with students to the buses.

DETERMINING IF A PUPIL REQUIRES ESCORT

The driver, in conjunction with the Transportation Agency, the School and the student's input shall determine if escort is required at a particular bus stop in compliance with Section 22112 of the California Vehicle Code. Particularly with new students registering in a school, with whom the Transportation Agency may not have exact address information or home location, the driver shall get verification of their address from the Dispatcher or School Office, and may have to rely on the student input for clarification. Every stop requiring an escort will be clearly marked on the route sheet.

WALKING TO AND FROM SCHOOL BUS STOPS

Students should be very careful when walking to and from school bus stops. Parents should accompany young children to the bus stop and assist in keeping order while waiting for the bus. Children should be instructed to keep on sidewalks or on the shoulder, and far away from the main traveled portion of the roadway. Children should pay close attention to traffic, weather conditions, and visibility conditions. Visible clothing, or clothing and backpacks with reflective material should be worn at all times. Children should remain orderly at all times and refrain from boisterous conduct or horseplay while walking to and from the school bus stop. Children should not engage in conversation with strangers or accept rides from passing motorists. When walking to or from a bus stop, children should face traffic.

GENERAL RULES OF CONDUCT AT SCHOOL BUS LOADING ZONES

Students should wait in an orderly fashion while at the bus stop in the morning. They should be at the bus stop at least five minutes prior to the posted stop time. Students should be at least twelve feet back from the main traveled portion of the roadway and visible to the driver. Pushing, shoving or horseplay is not allowed at the bus stop. Students should be mindful of the bus stop location. Many are in driveways and on private property. Students are not allowed to throw rocks or other objects, play around, cause excessive noise, touch or tamper with the other private property or vehicles nearby. Once the bus arrives students shall wait for the driver to come to a complete stop and the door of the bus to open before they begin to move forward to the bus. Students should board the bus one-at-a-time, using the available hand-rails, and move quickly to an open seat. If a student drops papers or other objects while boarding the bus he/she should get the attention of the driver. NEVER GO UNDER OR NEAR THE BUS TO RETRIEVE PAPERS OR OTHER OBJECTS. The driver may not be able to see you!

In the afternoon, students should wait at school according to the established pre-bus-loading procedure at the school. Teachers or aides on duty at the bus loading area shall maintain order over students, keep the students well away from the location where the buses pull up and orderly release or escort the students to their buses. Teachers or aides on duty must remain at the bus loading zone until all buses have departed. Drivers may need their help for disciplinary matters or to take students back to the office. Ensure that no students get close to buses, touch them, and in no case may a student go under the bus.

When students depart from school on the bus and they are arriving at their bus stop, they must remain seated until the bus comes to a complete stop, the brakes are set and the door is open before they stand up to exit the bus. Students should have all of their clothes and supplies together in preparation for their bus stop. Students should use handrails when leaving the bus and shall walk away from the bus to the shoulder or sidewalk and walk directly home. If a student drops papers or other objects while he/she is leaving the bus, please get the attention of the driver. NEVER GO UNDER OR NEAR THE BUS TO RETRIEVE PAPERS OR OTHER OBJECTS. The driver may not be able to see you.

SCHOOL BUS DANGER ZONES

The areas closest to the perimeter of the bus are called the danger zones. Students are directed to be no closer than twelve feet to the bus, except when loading and unloading. The vast majority of school bus accidents and injury to students occur outside of the bus in this danger zone. If a student drops papers, lunch boxes or other

objects while loading or unloading from the bus the student must get the attention of the driver. NEVER GO UNDER OR NEAR THE BUS TO RETRIEVE PAPERS OR OTHER OBJECTS. The driver may not be able to see you!

SAFE RIDING PRACTICES

In compliance with Education Code Section 39831.5, students annually receive instruction on proper loading and unloading procedures including escorting by the driver, proper passenger conduct, bus evacuation and location of emergency exits and emergency equipment. Instruction may also include responsibilities of passengers seated next to an emergency exit.

Prior to departure on any school activity trip, all pupils riding on a school bus or a school pupil activity bus (SPAB) shall receive safety instruction which includes, but is not limited to, location of emergency exits, and location and use of emergency equipment.

In addition to the expectations spelled out to students in the above, drivers orient students to rules and expectations their first days of each school year. Rules are posted in the buses. Consequences for poor behavior and rewards for good behavior are discussed. Classroom behavior is expected on all school buses. Students must remain seated at all times, bust keep all body parts inside the windows of the bus, must not eat, drink or smoke on the bus, must keep noise down, are not allowed to "roughhouse" on the bus and must follow all directions of the driver.

RED LIGHT CROSSINGS

When a student needs to cross the road and the stop is designated as an escorted crossing, the driver sets the parking brake, secures the bus, turns on the red lights, takes the key, opens the door and exits the bus with a hand held stop sign to escort the student across the road. The student should follow all of the directions of the driver, and not cross the road until the driver verbally tells the student to proceed. This crossing maneuver is considered most dangerous and students must be aware, alert and follow directions of the driver.

CLOTHING HAZARDS

In the past few years, there have been several serious student injuries or fatalities in other states due to clothing or backpacks that have drawstrings. The drawstrings have gotten caught in handrails on the bus, without the driver's knowledge. Please inspect the children's clothing or backpacks to ensure there are not drawstrings or other hanging objects that could get caught in the handrail or the door.

FIELD TRIPS

When planning a field trip, the school has several options. They may use a school bus, a school pupil activity bus (SPAB) operated by a charter bus company, use school owned automobiles or vans, use public transit or use parent-owned vehicles.

School Buses

School buses are the most highly regulated student transportation vehicles and school bus drivers are the most highly trained drivers in California. On any school field trip, whether on a bus or not, teachers shall have a roster of all students on the trip, an itinerary of the trip and should carry a supplemental first aid kit appropriate for the trip destination and activity intended. Teachers or coaches should plan all stops in conjunction with the transportation provider and should not allow students to eat while the vehicles are moving.

SPAB Buses

School Pupil Activity Buses are operated by a Charter Party Carrier (for-hire charter bus operator). SPAB buses need to be certified by the CHP Motor Carrier Inspector within the past 13 months and must have a certificate on board that is signed and dated by the inspector. The driver must also have received some special training and must have at least a Class B license and a Special Driver Certificate valid for driving a SPAB bus.

When you book a SPAB bus you must specify such and a school official shall inspect the bus certification and driver certification upon arrival at the school to pick up the group.

Public Transit

If the group intends to use public transit for their trip, the school should call the transit agency prior to the trip to ensure they are prepared for the group and to inquire regarding any special requirements for student groups.

School Vehicles

If school vehicles are to be used, they must be consistent with the law (may not seat more than nine students and the driver—and constructed so as not to hold more than that) and have a properly licensed driver who is an employee of the District. All passengers must be seat-belted while in the vehicle. It is ideal if such drivers received training in defensive driving and first aid practices and if the vehicle were part of a regular and systematic preventive maintenance program. The district should enroll the driver in the DMV Pull Notice program so the district receives notification of any accident, moving violation, driver safety points, or suspensions of the driver's license. It would be recommended that district employees that drive students in district vehicles also participate in a drug and alcohol testing program similar to school bus drivers.

Parent Vehicles

The use of parent vehicles for field trips shall strictly adhere to District Policy. All parents shall show proof of appropriate insurance. In no case shall a vehicle be used that is designed for more than nine passengers and the driver. In no case shall more than nine passengers plus the driver be seated in a parent vehicle. Parents should be fingerprinted and background checked as volunteers. This is the most dangerous mode of transportation for district field trips. The district will have no knowledge of a parent's vehicle and its relative mechanical safety nor of the stability and condition of the parents. Licensed high school students that are participating in school activities should never drive other high school students in their own vehicles or in district vehicles to or from school activities, practices or games off-site.

DRIVER RESPONSIBILITY TO CHECK FOR STUDENTS AFTER EACH RUN AND ROUTE

At the conclusion of each bus run, when the driver believes that all students have exited the bus, the driver shall, as soon as possible, find a safe location to park the bus, secure it and walk through the passenger compartment to ensure that no student is aboard. At the end of each route (a route consists of several runs) when the driver returns to the bus yard, every driver shall again walk through the driver compartment and complete the post-trip, child-check with Zonar to log that the passenger compartment of the bus has been inspected. Upon adoption of regulations by the California Highway Patrol relative to an electronic child check alarm by January 1, 2018, the Agency may need to amend this Plan to ensure compliance with new laws or regulations.

SPECIAL SITUATIONS OR CIRCUMSTANCES

If you encounter a student transportation safety situation that is not covered in this plan or seems unique, please contact West County Transportation Agency for direction or the School Pupil Safety Officer of the California Highway Patrol for direction.

Rev: 5/14, 7/14, 7/16, 11/16

Appendix E

FCMAT
FISCAL CRISIS & MANAGEMENT ASSISTANCE TEAM
CSIS California School Information Services

FISCAL CRISIS & MANAGEMENT ASSISTANCE TEAM
DRAFT STUDY AGREEMENT
October 5, 2017

The Fiscal Crisis and Management Assistance Team (FCMAT), hereinafter referred to as the team, and the Coalinga-Huron Joint Unified School District, hereinafter referred to as the district, mutually agree as follows:

1. BASIS OF AGREEMENT

The team provides a variety of services to local education agencies (LEAs). The district has requested that the team assign professionals to study specific aspects of the district's operations. These professionals may include staff of the team, county offices of education, the California State Department of Education, school districts, or private contractors. All work shall be performed in accordance with the terms and conditions of this agreement.

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

2. SCOPE OF THE WORK

A. Scope and Objectives of the Study

1. Conduct an organizational and staffing review of the following departments and make recommendations for staffing improvements or reductions, if any:

   a. Maintenance and Operations (including grounds and custodial)
   b. Transportation (including special education transportation)

2. Evaluate the current work low and distribution of functions in each of the above departments and make recommendations for improved efficiency, if any.

3. Review the operational processes and procedures for each of the above departments and make recommendations for improved efficiency, if any.

B. Services and Products to be Provided

1. Orientation Meeting - The team will conduct an orientation session at the district to brief district management and supervisory personnel on the team's procedures and the purpose and schedule of the study.
2. On-site Review - The team will conduct an on-site review at the district office and at school sites if necessary.
3. Exit Meeting - The team will hold an exit meeting at the conclusion of the on-site review to inform the district of significant findings and recommendations to that point.
4. Exit Letter – Approximately 10 days after the exit meeting, the team will issue an exit letter briefly memorializing the topics discussed in the exit meeting.
5. Draft Report - Electronic copies of a preliminary draft report will be delivered to the district's administration for review and comment.
6. Final Report - Electronic copies of the final report will be delivered to the district's administration and to the county superintendent following completion of the review. Printed copies are available from FCMAT upon request.
7. Follow-Up Support – If requested by the district within six to 12 months after completion of the study, FCMAT will return to the district at no cost to assess the district's progress in implementing the recommendations included in the report. Progress in implementing the recommendations will be documented to the district in a FCMAT management letter. FCMAT will work with the district on a mutually convenient time to return for follow-up support that is no sooner than eight months and no later than 18 months after completion of the study.

3. PROJECT PERSONNEL

The FCMAT study team may also include:

A. To be determined	***FCMAT Staff***
B. To be determined	***FCMAT Consultant***
C. To be determined	***FCMAT Consultant***

4. PROJECT COSTS

The cost for studies requested pursuant to Education Code (EC) 42127.8(d)(1) shall be as follows:

A. $650 per day for each staff member while on site, conducting fieldwork at other locations, presenting reports and participating in meetings. The cost of independent FCMAT consultants will be billed at their actual daily rate for all work performed.

B. All out-of-pocket expenses, including travel, meals and lodging.

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

Based on the elements noted in section 2A, the total not-to-exceed cost of the study will be $13,800.

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

Payments for FCMAT's services are payable to Kern County Superintendent of Schools - Administrative Agent located on 1300 17th Street, City Centre, Bakersfield, CA 93301.

5. RESPONSIBILITIES OF THE DISTRICT

A. The district will provide office and conference room space during on-site reviews.

B. The district will provide the following if requested:

1. Policies, regulations and prior reports that address the study scope.
2. Current or proposed organizational charts.
3. Current and two prior years' audit reports.
4. Any documents requested on a supplemental list. Documents requested on the supplemental list should be provided to FCMAT only in electronic format; if only hard copies are available, they should be scanned by the district and sent to FCMAT in electronic format.
5. Documents should be provided in advance of fieldwork; any delay in the receipt of the requested documents may affect the start date and/or completion date of the project. Upon approval of the signed study agreement, access will be provided to FCMAT's online SharePoint document repository, where the district will upload all requested documents.

C. The district's administration will review a preliminary draft copy of the report resulting from the study. Any comments regarding the accuracy of the data presented in the report or the practicability of the recommendations will be reviewed with the team prior to completion of the final report.

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

6. PROJECT SCHEDULE

The following schedule outlines the planned completion dates for different phases of the study and will be established upon the receipt of a signed study agreement:

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

7. COMMENCEMENT, TERMINATION AND COMPLETION OF WORK

FCMAT will begin work as soon as it has assembled an available and appropriate study team consisting of FCMAT staff and independent consultants, taking into consideration other jobs FCMAT has previously undertaken and assignments from the state. The team will work expeditiously to complete its work and deliver its report, subject to the cooperation of the district and any other parties from which, in the team's judgment, it must obtain information. Once the team has completed its fieldwork, it will proceed to prepare a preliminary draft report and a final report. Prior to completion of fieldwork, the district may terminate its request for service and will be responsible for all costs incurred by FCMAT to the date of termination under Section 4 (Project Costs). If the district does not provide written notice of termination prior to completion of fieldwork, the team will complete its work and deliver its report and the district will be responsible for the full costs. The district understands and agrees that FCMAT is a state agency and all FCMAT reports are published on the FCMAT website and made available to interested parties in state government. In the absence of extraordinary circumstances, FCMAT will not withhold preparation, publication and distribution of a report once fieldwork has been completed, and the district shall not request that it do so.

8. INDEPENDENT CONTRACTOR

FCMAT is an independent contractor and is not an employee or engaged in any manner with the district. The manner in which FCMAT's services are rendered shall be within its sole control and discretion. FCMAT representatives are not authorized to speak for, represent, or obligate the district in any manner without prior express written authorization from an officer of the district.

9. INSURANCE

During the term of this agreement, FCMAT shall maintain liability insurance of not less than $1 million unless otherwise agreed upon in writing by the district, automobile liability insurance in the amount required under California state law, and workers compensation as required under California state law. FCMAT shall provide certificates of insurance, with Coalinga-Huron Joint Unified School District named as additional insured, indicating applicable insurance coverages upon request prior to the commencement of on-site work.

10. HOLD HARMLESS

FCMAT shall hold the district, its board, officers, agents and employees harmless from all suits, claims and liabilities resulting from negligent acts or omissions of its board, officers, agents and employees undertaken under this agreement. Conversely, the district shall hold FCMAT, its board, officers, agents and employees harmless from all suits, claims and liabilities resulting from negligent acts or omissions of its board, officers, agents and employees undertaken under this agreement.

11. CONTACT PERSON

Name: Lori Villanueva
Telephone: (559) 935-7500
E-mail: lvillanueva@chusd.org

10/10/17

Lori Villanueva, Interim Superintendent — Date
Coalinga-Huron Joint Unified School District

10-5-17

Michael H. Fine, — Date
Chief Executive Officer
Fiscal Crisis and Management Assistance Team