



FCMAT

FISCAL CRISIS & MANAGEMENT
ASSISTANCE TEAM

CSIS California School Information Services

San Bernardino City Unified School District

Technology Review

December 21, 2018



Michael H. Fine
Chief Executive Officer







CSIS California School Information Services

December 21, 2018

Dale Marsden, Ed.D., Superintendent
San Bernardino City Unified School District
777 North F Street
San Bernardino, CA 92410

Dear Superintendent Marsden:

In May 2018, the San Bernardino City Unified School District and the Fiscal Crisis and Management Assistance Team (FCMAT) entered into an agreement for a review of the district's technology program and services. Specifically, the agreement states that FCMAT will perform the following:

1. Analyze the status of the following elements of the district's technology services and make recommendations for improvement, if any:
 - a. Data center including, but not limited to, security and safety.
 - b. Staffing and organization.
 - c. Help desk process including ticketing, assignments, and resolution time.
 - d. Leadership of technology use in the district.
 - e. Project management.
 - f. Planning, and alignment of budget with plans.
 - g. Communication within the department and externally.
2. Review technology department job descriptions and alignment of duties, and make recommendations for improvement, if any.
3. Review the district's current implementation of hosted Exchange/Outlook services with a focus on recent outages. Review district planning for migration of these services to an off-premise O365 environment and make recommendations for improvement, if any.

This report contains the study team's findings and recommendations.

FCMAT

Michael H. Fine, Chief Executive Officer

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We appreciate the opportunity to serve you, and we extend thanks to all the staff of the San Bernardino City Unified School District for their cooperation and assistance during fieldwork.

Sincerely,

A handwritten signature in black ink that reads "Michael H. Fine". The signature is written in a cursive, flowing style.

Michael H. Fine
Chief Executive Officer

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About FCMAT

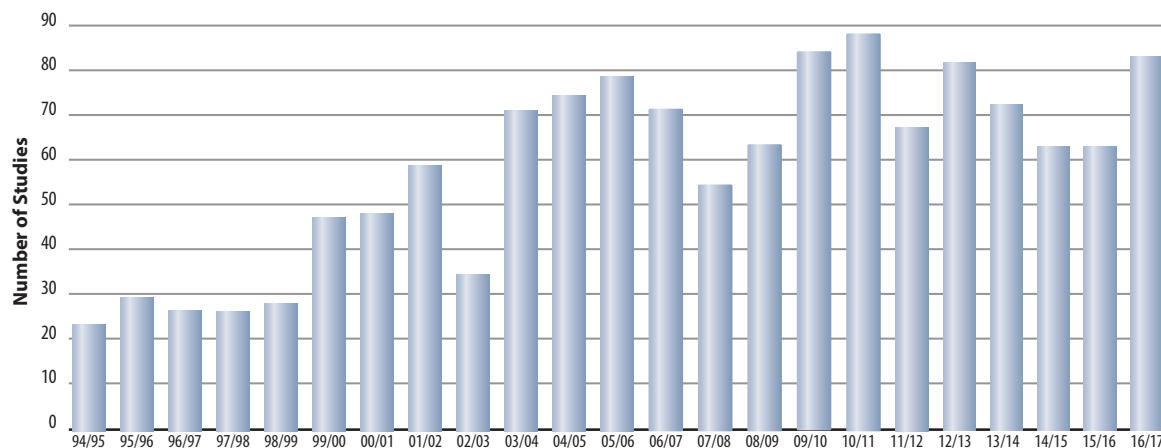
FCMAT's primary mission is to assist California's local K-14 educational agencies to identify, prevent, and resolve financial, human resources and data management challenges. FCMAT provides fiscal and data management assistance, professional development training, product development and other related 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 state-wide 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 San Bernardino City Unified School District is in San Bernardino County and serves most of the city of San Bernardino and a portion of Highland. According to the district website, the district has an enrollment of approximately 53,000, making it the sixth largest in California. Students are served by 86 schools including elementary, middle, comprehensive high schools and other specialty schools.

During the 2017-18 school year approximately 88% of students were eligible for the federal free and reduced-price meal program and 25% were English language learners.

In May 2018 the district requested that FCMAT assist the district by reviewing its technology programs and services.

Study and Report Guidelines

FCMAT visited the district on May 22, 23, 24, and 30, 2018 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
- Staffing Overview
- Leadership and Planning
- Budget Development
- Communications
- Help Desk
- Data Center
- Email Implementation
- Administrative Rights, Student Email and Passwords
- Job Descriptions and Duties
- 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:

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*As a member of this study team, this consultant was not representing his employer but was working solely as an independent contractor for FCMAT.

Each team member reviewed the draft report to confirm accuracy and achieve consensus on the final recommendations.

Executive Summary

Staffing Overview

The Information Technology Department is led by the director of information technology who reports to the chief business and financial officer in the Business Services Division. The department is composed of two groups, Development, Operations and Training (DOTS) and Network Engineering and Technical Services (NETS). Each of these is led by an assistant director who report to the director of information technology. A total of 41 full-time equivalent (FTE) positions are assigned to the department.

Leadership and Planning

The director of information technology leads the department. Education Services' Accountability and Education Technology staff provide educational technology support. In many technology-infused districts, a technology leader oversees both the educational and administrative/operational technology. These positions are often chief technology officers (CTOs) who participate in the superintendent's cabinet to have a complete view of district issues and goals and a voice in decision-making related to strategic direction, priorities, planning and budgets.

During interviews with FCMAT, Information technology (IT) staff consistently indicated that they did not have a clear understanding of the department's priorities, plans and current projects.

The director of Accountability and Education Technology (AET) leads a district technology committee. The director of information technology and a few other IT staff attend the committee meetings.

The technology plan for the district expired this year (2017-2018) and a new plan has not yet been proposed or approved. The process of developing a plan and the unified vision it can provide are compelling reasons to create a new document for the district.

Budget Development

The IT Department budget is developed annually by the director of IT and is then submitted to Fiscal Services. The director of IT makes decisions about infrastructure improvements and upgrades based on input from network and computer specialists in the NETS group, selects products and vendors, and approves purchase requests for all technology equipment.

Except for the input from NETS staff related to infrastructure needs covered by E-rate, the director of IT creates the annual department budget without input from other IT staff. Some IT staff indicated that requests for purchases of equipment, tools and needed software to perform their jobs are sometimes refused. Staff were unclear about how department budgets are determined and indicated that there is no process for submitting formal requests or participating in budget development discussions or planning.

Communications

IT Department communications are inconsistent, poor, and do not provide the knowledge necessary for the staff to be effective. Although some IT staff participate in regular program-based meetings related to their work, staff interviews indicated a lack of opportunities for open discussion or individual meetings with department leadership, collaboration with other IT teams, or the provision of input and feedback. Some individuals report being uninformed and unable to participate in department decisions.

Insufficient opportunities for discussion and problem solving, and for managers to communicate overall department and district goals and strategies, has led to an environment of uncertainty and poor morale.

Help Desk

FCMAT visited an elementary, middle, and high school deemed by the district as representative of schools districtwide and met with site administration, teachers, librarian, and front office staff. The findings were universal at each site. Overall, staff appears to have no understanding of the IT Department leadership, processes, or staffing. When staff members were asked to rate the department, the response was generally poor.

The district uses the FootPrints software system from BMC as its help desk software. School sites reported that a support ticket often takes two months or more to be completed. Support tickets are initiated by sending an email or calling the help desk. As used, this requires human involvement for every ticket since an IT staff member must manually enter all tickets into the system. The processes need to be changed and updated to create a functioning delivery method for resolving work orders in a timely manner.

The help desk technician oversees the taking in of requests for service, deciding priority, and assigning the request. There is no formal process for customers' (teachers, students, and staff) feedback or communication about the request entered, priority assigned, or progress. There appears to be little accountability for tickets delayed or completed.

During the FCMAT fieldwork, interviewees frequently stated that the help desk is understaffed, and it is often difficult to provide service.

Data Center

A tour of the data center found many issues.

Two racks of storage devices represent the data backup system. At a minimum, one of the racks should be located in a secured room in a separate district facility where backups of data can be stored. There is no evidence of off-site cloud-based backups. Staff had little confidence that a data restore would work based on lack of a documented and tested restoration process and lack of required equipment.

The district Maintenance Department reportedly installed the environmental systems without proper data room engineering conducted before installation. The air in the room seemed unusually dry, and environmental monitoring is lacking other than temperature.

There is no emergency electrical shutoff to prevent harm to employees or equipment, and there is no data room engineered fire suppression system, which are typically found in an enterprise-level data center.

Email Implementation

The district serves more than 7,400 employees and 9,500 mailboxes and runs Microsoft Windows Server 2008 R2 Service Pack 1 and Microsoft Exchange 2010 Service Pack 3.

The district has a strategic priorities document indicating it plans to transition from on-site Exchange services to a cloud-based service, yet as of the FCMAT study, a cloud-based service had not been selected. The district lacks an Email retention policy although some interviewees mentioned a seven-year retention period.

The Exchange environment is routinely backed up using Commvault software with full backups occurring weekly. The district is setting up an off-site backup recovery site in the local area, but this work was in progress and not functional at the time of FCMAT's fieldwork. The proposed site is within the district's geographical boundaries, which could pose a serious problem in case of a natural disaster.

In trying to understand the district's concern over email outages, a review of help desk tickets indicated more than 70 related to email issues since January 2018. Of these, none were associated with the district's Exchange environment, and approximately 10 were related to client application issues.

While the Exchange systems are up to date with cumulative updates, there is no scheduled preventive maintenance window for systems and servers or policy defining a preventive maintenance schedule. As a result, IT staff routinely bypass system updates and patching. Several Exchange database outages occurred because of the amount of time backups were taking and the fact that the Exchange logs were not truncating.

Administrative Rights, Student Email and Passwords

Teachers and district staff do not have local administrative security privileges on PC-based computers. This places unneeded dependence on technicians to fix minor problems, install updates, and install applications.

Site teachers uniformly stated that students are not given warning or are unaware of the policies set by the IT Department concerning password changes.

Students do not have district-provided email accounts. This causes teachers who utilize Google classroom to use student private email addresses to communicate and work outside the district technology and security systems.

Job Descriptions and Duties

Overall, most of the job descriptions of positions in the Information Technology Department are accurate and reflect the incumbents' duties. A few job descriptions need to be updated to include either changing requirements of the positions or more accurately reflect the current duties and skills required in the positions.

Findings and Recommendations

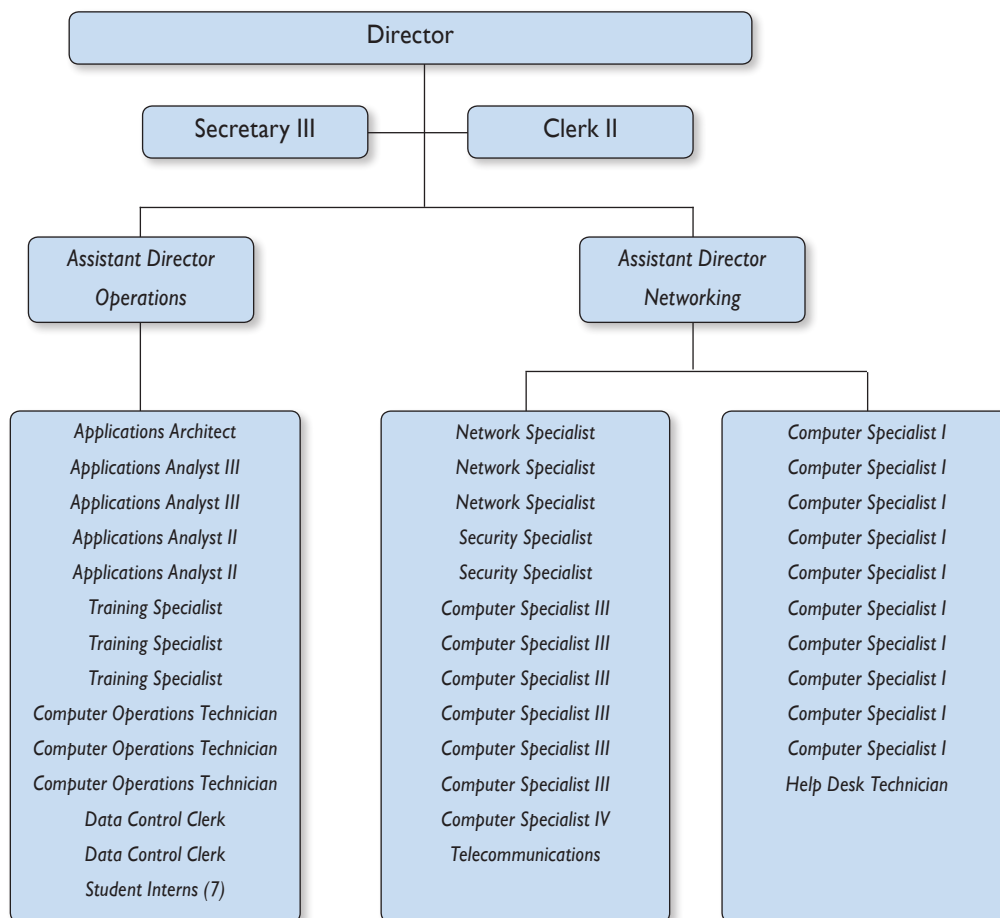
Staffing Overview

The Information Technology Department is led by the director of information technology who reports to the chief business and financial officer in the Business Services Division. The department is composed of two groups, Development, Operations and Training (DOTS) and Network Engineering and Technical Services (NETS). Each is led by an assistant director who report to the director of information technology. A total of 41 FTE are assigned to the department.

More detailed information on staffing can be found in the Job Descriptions and Duties section of the report.

The department organization is illustrated below.

Information Technology



Leadership and Planning

The assistant director of operations manages the DOTS group. Staff in DOTS includes an applications architect, applications analysts, training specialists, computer operations technicians, data control clerks, a help desk technician and a team of student interns from the local community college.

The NETS group is managed by the assistant director of networking and includes network specialists, security specialists, computer specialists, and a telecommunications specialist.

According to the IT Department's website information, the goal of the department (also referred to on the district website as the management information services department) is to "support the business strategies of the District." This includes providing a "secure environment for data integrity, accessibility, system availability and delivery of information resources to the employees of the District."

The director of the department of Accountability and Educational Technology (AET) leads educational technology use. This director reports to the assistant superintendent of educational services. In addition to managing state and federal mandated testing and integrating technology into the curriculum and instructional practice, AET also "supports school staff and district programs with their data and technology needs" according to the AET department's website.

AET relies on IT Department staff to provide data, generate reports and provide support for educational hardware and software and the student information systems. AET also employs several technical support who participate in the superintendent's cabinet to have a complete view of district issues and goals and a voice in making decisions on strategic direction, priorities, planning and budgets. Because high-capacity, reliable, accessible technology systems and infrastructure are essential for all aspects of school district organizations, technology leadership must be aligned across all departments. Establishing a CTO position demonstrates a district commitment to a cohesive, high-quality, high-performing technology program.

Some staff in the IT Department expressed concerns that their expertise and advice are not acknowledged or considered either in the department or at the district level. Some IT staff perceive that rather than providing a leadership role in technology planning for the district, the department is almost entirely reactive to decisions made elsewhere.

The school sites indicated they lack interaction with IT Department leadership, but receive initiatives and support from AET. They were uncertain whether the director of IT participated in management or principal meetings. Site staff reported that their interactions with IT were generally related to network outages and network equipment, wireless coverage on campus, and computer support for help desk issues. Some school site staff use individual contacts in the IT Department for assistance.

The district technology committee is organized through AET, led by the director of AET and includes the IT director, assistant director, program specialists, a computer specialist III, and a microcomputer specialist II in addition to some school site managers and site-based technology support staff. The district technology committee meets periodically throughout the year and was responsible for developing the district technology plan, dated 2013-2018. The director of management information systems' job description, which is used for the IT director position, outlines only duties related to the IT Department and does not include responsibility for district technology planning.

The district technology plan expires in 2018, and IT staff were not aware of any updates in process. The lack of a new plan with specifics about the goals for information and educational technology contributes to uncertainty among IT staff about department direction and priorities. The process of developing a plan and the unified vision it can provide are compelling reasons to create a new plan. During plan development, discussions on priorities, methods, and measuring success occur and can increase the plan's quality and vision. This may effectively be accomplished in coordination with the annual local control and accountability plan (LCAP) and local educational agency (LEA) plan process and would provide an opportunity to integrate the discussions and vision for technology into the larger plan for the district.

The development of a new comprehensive technology plan would provide an opportunity to gather input from all involved, include IT staff in a collaborative process with other departments, and create a collective vision for the use of technology in the district. Board Policy 0440 outlines the requirements for the development of a three- to five-year technology plan that would address technology for student achievement and for district governance, administration, support and communications.

Information technology staff often described an environment with few opportunities for structured interaction among team members within and across the two groups. Some described department leaders as out of touch or unwilling to listen to staff concerns. Some staff reported that the department leadership is unaware of what is occurring with some teams but micromanages others. The perception that there is uneven treatment of employees has contributed to dissatisfaction with department leadership. This perception was reflected in comments that the director and assistant directors practice favoritism, arbitrary and unexplained decision-making, and unfair distribution of workloads. There is a perception that workloads are not distributed fairly and that unqualified staff are sometimes given work that is beyond their capabilities. Staff cited dissatisfaction with leadership and their other co-workers related to lack of clear direction and cohesiveness among the leadership team, uncertainty about scope of work in their job description, and lack of collaboration between groups within the department.

In high performing technology departments, the CTO focuses on developing an inclusive environment with an engaged team of high performing, enthusiastic staff. Effective CTOs demonstrate collaboration by devoting time to developing and participating in productive working teams with department leaders. A strong technology leader must be an excellent communicator and team builder with the ability to create a high-trust, positive culture. By validating and optimizing the skills and contributions of individuals and acting as a facilitator rather than a top-down decision maker, an effective technology leader creates a culture of professional excellence and collaboration.

Recommendations

The district should:

1. Consider replacing the director of information technology position with a chief technology officer (CTO) position that reports to the superintendent and participates in cabinet.
2. Consider combining the IT and AET departments either under a qualified CTO or under the same division administrator to help ensure coordination of efforts and improved communications between teams.

3. Develop a new comprehensive district technology plan in alignment with the LCAP planning process to facilitate the alignment between IT and AET and provide a vision and road map for technology use throughout the district.
4. Develop strategies for creating a cohesive IT Department management team and for team building within the department.

Budget Development

Funding for the Information Technology Department is included in the business services portion of the district base programs budget which are funded through LCFF sources, other state revenue, and local sources. Allocations for technology resources that support student learning are itemized in the LCAP and include the cost of a learning management system (LMS) for the district, support for the 1-to-1 technology take-home project at middle and high schools, and centralized information technology support.

The IT Department budget is developed annually by the director of IT and is then submitted to Fiscal Services. The director of IT makes decisions about infrastructure improvements and upgrades based on input from network and computer specialists in the NETS group, then selects products and vendors, and approves purchase requests for all technology equipment. The network infrastructure costs have been offset whenever possible using E-rate funding, the amount of which has been a prime factor in the scope of work each year and in the determination of a seven-year replacement cycle. For large purchases not covered by E-rate, the new mobile device management (MDM) solution for example, the director of IT and staff in the NETS group develop requests for proposal (RFPs) in coordination with the purchasing department.

Except for the input from NETS staff related to infrastructure needs covered by E-rate, the director of IT creates the annual department budget without input from other IT staff. Some staff indicated that requests for purchases of equipment, tools and software to perform their jobs are sometimes refused. Staff were unclear about how department budgets were determined and indicated that there is no process for submitting formal requests or participating in budget development discussions or planning.

Collaborative IT departments implement processes and provide opportunities for staff to participate in budget development. Effective technology leaders communicate information about the district's fiscal situation and convey forecasts and expectations for future budget issues to create a shared understanding among staff of budget constraints and priorities. They also encourage input from department staff. By hearing from staff in an open forum or through 1-to-1 meetings, directors of IT can explain or interpret perceived inequities and gather information about needs and wants for their own work or for the improved operation of the technologies in the district.

The school sites are responsible for paying for staff and student computers and classroom technology equipment. School principals have discretion over equipment selection and some allow teachers to select the types of devices they prefer for their classrooms. School site staff interviews indicated that schools use a combination of grant funds and district-provided discretionary site funds for their technology purchases. The district has promoted the 1-to-1 take home Chromebook program for students by organizing a lease program through an outside vendor and handling the warranties in-house. The director of IT determines which brands and vendors are used, and all purchase requests are routed through the IT Department for approval by the director of IT.

Although the schools are authorized to select their preferred devices for students and staff, the IT Department is assigned to manage and support all devices, ensuring they have anti-virus protection, and tracking inventory assets. Some IT staff cited the difficulties of implementing and supporting a remote management system for the many types and ages of devices in use within the district.

Staff interviews in schools and with the Information Technology Department staff indicated that there is a general lack of adequate funding for technology. Within the IT Department, staff indicated that the impact of insufficient budget has resulted in fewer employees to do increasing amounts of work in critical functions, not enough tools and supplies to perform jobs, and outdated or inadequate infrastructure, management systems, and security and disaster recovery systems.

All school districts are experiencing increased cost and complexity of technology and a proliferation of mobile devices and associated management and support costs. Effective technology programs are characterized by a unified, multiyear technology plan that incorporates and details the total cost of ownership and specifies a device and infrastructure plan for updating and replacement. These plans are developed in collaboration between IT, business services and educational services with input from staff, and are communicated and supported by cabinet, the superintendent and the board. Some districts have begun to set aside a portion of general funds each year to accommodate a systematic, ongoing technology infrastructure updating and replacement plan and avoid the extremes and disruption of massive one-time rebuilds. Technology department staff in these districts participate in budget reviews, understand district priorities, learn about the fiscal challenges and forecasts for the future, and have a voice in reviewing budgets that affect their jobs. As a result, even though funding is seldom sufficient in public school districts, staff has an opportunity to understand the reasons and participate in problem solving to cope with the situation and prioritize spending.

The district's LCAP includes funding for a learning management system and "centralized Information Technology support." IT staff interviews did not indicate any awareness of this system or a new initiative.

Large scale deployment of an LMS will necessitate a well-planned and supported project plan including key participation by data support and training staff. Successfully implemented technology projects require participation by IT from the beginning of the planning process, ample time to understand the scope and pace of the project, its impact on other ongoing projects, and a high performing project team to sustain and fully implement the system over time.

Recommendations

The district should:

1. Consider having the IT Department develop a zero-based budget to ensure that all expenditures are required and meet the needs of the district.
2. Establish a process for gathering IT staff input during budget development.
3. Continuously inform IT staff of the budget environment in the district and state.
4. Create a project plan or distribute an existing plan for the implementation of the district learning management system.
5. Ensure that IT Department budget plans align with district initiatives to ensure board and superintendent support.
6. Consider setting aside a portion of general funds each year to accommodate a systematic, ongoing technology infrastructure updating and replacement plan.

Communications

Formal communications within the Information Technology Department occurs in the following ways.

Leader	Conducts
Director of information technology	Weekly meetings with the DOTS assistant director and the applications architect, Weekly meetings with NETS assistant director, Quarterly full department meetings.
Assistant director of the network engineering and technical services (NETS) group	Weekly meetings with the computer specialist I team, Weekly meetings with a group comprised of the computer specialist IIs, IIIs, IVs and Vs, telecommunications specialist, security specialist and network specialists.
Assistant director of the development, operations and training (DOTS) group	Monthly meetings with each of the applications, data exchange and CALPADS teams, Biweekly DOTS staff meetings.

Full department meetings that include the 28 school-site based computer support technicians are scheduled quarterly. Impromptu meetings often occur as managers and IT staff check in with their teams during the day.

Staff reported that in previous years, the full department met monthly, and the entire NETS staff met weekly. Full department meetings were reduced to quarterly, and the NETS meetings were divided into two separate weekly meetings, one with the computer specialist I group, and another with the computer specialists II and above. The assistant directors are responsible for creating agendas for each of their team meetings and transmitting information from the director of IT to their respective staff. Some staff indicated that the information they receive about other IT Department activity during meetings is incomplete.

Although some IT staff participate in regular program-based meetings related to their work, staff interviews indicated a lack of opportunities to have open discussion or individual meetings with department leadership, collaborate with other teams in IT, or provide input and feedback. Some individuals report being uninformed and unable to participate in department decisions.

Insufficient opportunities for discussion and problem solving and for managers to communicate overall department and district goals and strategies leads to uncertainty and poor morale. High-performing technology departments have established methods for continuous, meaningful communication between teams within the department. This is typically a regular schedule of team meetings and full department meetings where directors and managers provide information and emerging issues from district level meetings and encourage discussion and problem solving among staff. Regularly discussing issues builds a culture of trust, teamwork, and collaboration.

Smaller team meetings with job-alike or project-based teams are also a characteristic of successful technology departments. During busier periods, these meetings may be short and devoted to single issues, but the habit of teamwork is reinforced and sustained. These provide a regular forum for interactions among staff, and individuals who participate become accustomed to working together to solve problems and develop confidence in their ability to contribute and participate.

Interviews with IT Department staff indicated that although their particular team may operate smoothly, in general there is noticeable tension in the department. This was attributed to several factors including department restructure, addition of new staff, unclear job duties, management methods and changes, and interpersonal friction. Descriptions of the department included terms such as toxic, low morale, favoritism, and negative competition between staff. Some mentioned that teamwork is lacking, and communication between teams is inconsistent and unstructured.

In effective organizations, a unified vision, ample planning, regular opportunities for collaboration, and consistent, ongoing communication lessen the potential for overall disruption. The leaders establish frequent opportunities for their employees to meet with each other, facilitate problem-solving discussions, and welcome open discussion and participation.

In the district's IT Department, the practice of separate meetings between the director of IT and the DOTS and NETS assistant directors contributes to incomplete information and differences in messaging from leadership to employees. Leaders in large IT departments often split their staff meetings, but they also have a very cohesive and productive management team to ensure their department staff are thoroughly informed about all aspects of the department operation and receive a complete and consistent message. The director and assistant directors should regularly meet as a team to review emerging issues, affirm department priorities, provide information, and agree on agendas for their separate staff meetings.

The IT Department selected, and is in process of implementing, an online project management system, Smartsheet. This provides varied levels of secure read-only or write access of IT projects, which are entered into the system. The applications architect is assigned as the project manager for this system, but it is not yet fully implemented. Training specialists participate in the implementation by producing user manuals and training materials for the staff use of Smartsheet.

Several staff interviewed reported that they are sometimes unaware of upcoming initiatives and projects until they are assigned to assist. Some staff do not have access to the Smartsheet project management system to view project plans, objectives or timelines.

A shared online project management system can be effective in keeping staff informed and supporting inclusion and high-productivity in large IT departments. The system should include all projects and be accessible by all staff. Managers should assign levels of access, with view-only being a minimum.

The director of IT has the primary responsibility for communication between the IT Department and external users and departments. Communication to and from district leadership occurs through the director of IT's meetings with the CBO, and the IT Department is represented on the district technology committee by the director of IT, assistant director of operations, the computer specialist IVs, and the applications architect. The IT Department training specialists publish a monthly "Tips and Tricks" newsletter that describes the training opportunities conducted by IT staff. The newsletter is distributed to district staff via email and includes links to training registration, manuals, videos and other support resources.

Although several IT Department staff attend the technology committee meetings, some staff within the IT Department report that they are isolated and generally unaware of what is occurring at the district level. Some IT staff stated that the AET Department makes all decisions and that IT receives direction without any prior planning, communication, or opportunities for input. Their workflow is sometimes interrupted because they are assigned to unanticipated projects. As a result, their completion of scheduled and planned work is postponed, making it appear that they do not perform well in their job.

By not participating in district-level conversations and discussion, some staff perceived that their input, concerns and expertise were not communicated beyond the department. Staff expressed concern that they were unaware of district technology projects and that the decisions that affect the work of the IT Department are made outside of the department. When decisions are made that affect the IT staff, as in the selection of student and staff devices, for example, staff stated that decisions were made “top-down” with no consideration for IT expertise or input. Some indicated that they had no opportunity to participate in discussions or planning about upcoming projects.

The director of IT is responsible for the two-way flow of information between the IT Department and the district, articulating and communicating district priorities and strategies to department staff, representing IT Department interests during district planning processes, conveying information to district leaders, and aligning department projects, workflows and methods with district priorities. In large districts, this flow of information through IT Department leadership is especially critical since the demands of completing day-to-day tasks sometimes make it difficult for staff to keep focused on the overall goal.

In successful, large technology departments, leaders communicate often and in multiple ways to staff in their departments. Internal departmental news, a routine of small team and full-department meetings, distribution, posting, and archiving of meeting agendas and minutes provide a variety of methods for department staff and district users to access information. Some districts employ their communications department staff to assist with external and internal communications, and many are developing intranets for staff collaboration.

The district website has home page links for both the Information Technology and Accountability and Educational Technology departments. While the IT site lists department goals as employee and administrative systems focused, it also has links to educational applications and tools. The structure and navigation of the district website reinforce the notion of separate IT and educational technology programs, but because of the overlap in function, the site structure causes confusion for staff and the community. Users who are searching for the student take-home technology program, for instance, must go to their school site page or the educational technology site even though the warranties and laptop setup are managed in IT. Staff interviews indicated there is a “future schools” and a “vision 2028” initiative in the district, but descriptions of these programs could not be located in the district website or LCAP.

Some districts frequently utilize their communications specialists to assist with the structure and content of district websites to ensure they are up to date, consistent, and accurate for the public, and to segregate and organize password-protected, staff-only content.

Recommendations

The district should:

1. Establish a more frequent schedule of IT Department meetings that include all staff in addition to the combined smaller, more frequent team meetings.

2. Combine department director and assistant director meetings into one weekly leadership team meeting to align initiatives, discuss emerging issues, and determine agendas for team and department meetings.
3. Enhance the project management system by including all IT and AET projects and provide access to all IT and AET staff with appropriate permissions at a minimum of read-only.
4. Consider utilizing the district communications team to design and assist with external and internal technology communications, restructure of the district website, and implementation of a district intranet.

Help Desk

FCMAT visited an elementary, middle, and high school deemed by the district as representative of schools districtwide and met with site administration, teachers, the librarian, and front office staff. By design, FCMAT did not meet with site technology staff or district technology staff at sites. Findings were universal at each site. Overall, staff appeared to have no understanding of the IT Department leadership, processes, or staffing, and when asked to rate the IT Department, the response was generally poor.

The district uses the FootPrints software system from BMC as its helpdesk software. School sites reported that a support ticket often takes two months or more to be completed. Support tickets are initiated by sending an email or calling the help desk. As used, this requires an IT staff member to manually enter all tickets into the system. A principal or site hired technology staff can call in to escalate, but escalation does not often result in solving issues more quickly. The exception to this response is when a site reports the internet or phones are down, which results in a higher-level response from the IT Department. The processes developed over time and need to be changed and updated to create a functioning delivery method for resolving work orders in a timely manner.

The help desk technician oversees taking in requests for service, deciding priority, and assigning the request. The technician is assisted by student interns, but the number of interns frequently varies.

There is no formal process for customers' (teachers, students, and staff) feedback or communication about the request entered, priority assigned, or progress. There appears to be little accountability for tickets delayed or completed.

During the FCMAT fieldwork, interviewees frequently stated that the help desk is understaffed, and it is often difficult to provide service. Employees commented that the desk lacked structure and consistency.

Districts with effective help desk operations allow their end-users to submit tickets and receive updates on status and completion. They also monitor the overall number of tickets, categories of tickets, and completion times by technician. This allows them to determine necessary staffing levels and additional training that might be needed by the end users.

Recommendations

The district should:

1. Configure the FootPrints system to allow all users access and train users to submit tickets directly into the FootPrints system.
2. Analyze the number of tickets and completion time to determine if another help desk technician is needed.
3. Analyze the type of tickets submitted on an ongoing basis to determine if additional training in specific areas is needed for end users. This will help reduce the number of tickets submitted.
4. Configure the FootPrints system to allow email submission of tickets directly into the help desk system.

5. Document the process of help desk problem resolution through ticket entry and completion and provide this information to all users.

Data Center

The data center is located in the SMART building in San Bernardino and is also the location of the IT Department. The IT Department administration reported that a decision was made to host the student information system (SIS), Aeries, off site with the Aeries vendor.

In a tour of the data center, many issues were discovered including the following:

1. Two racks of storage devices represent the data backup system. At a minimum, one of the racks should be located off site in a secured room at a school site that is geographically across the district where backups of data can be stored. There is no evidence of off-site cloud-based backups. IT staff seemed to have little confidence that a restore would work based on lack of a documented and tested restoration process and lack of required equipment.
2. The district Maintenance Department reportedly installed the environmental systems without conducting proper data room engineering beforehand. The air in the room seemed unusually dry, and environmental monitoring is lacking other than for temperature.
3. There is no emergency electrical shutoff.

The center has no data room engineered fire suppression system, which is typically found in an enterprise-level data center

Recommendations

The district should:

1. Create and document a disaster recovery plan that includes biannual restoration of backups to server hardware or a virtual server host that is not part of the normal production environment.
2. Engage all departments to create a plan of the data that is backed up and the interval. For example, SIS data can be backed up once a day, and incremental backups are the responsibility of Aeries hosted services.
3. Select an off-site in-district location to install the second rack of backup equipment. This should preferably be at a site that is the greatest distance from the IT facility. Once rack two is installed, conduct a restore to test the installation.
4. Ensure that proper equipment is available to restore system and data functionality and data access.
5. Purchase a cloud-based backup that keeps all data in a remote geographical location. This is the third level of backup and can be slow speed. During a substantial disaster such as earthquake, the district data will be secure.

6. Install an enterprise-level environmental monitoring appliance such as APC NetBotz Room Monitor 570 (NBRK0570) with the appropriate number of environmental sensors and cameras for the room. Create clear documentation on who gets alerts, who monitors during work hours and incident response after hours.
7. Hire an engineering firm that specializes in enterprise-level data centers to assess data from the monitoring system and make recommendations on the following:
 - a. The fire suppression system
 - b. Electrical safety concerns
 - c. Air conditioning and other environmental factors

Email Implementation

The district serves more than 7,400 employees and 9,500 mailboxes and runs Microsoft Windows Server 2008 R2 Service Pack 1 and Microsoft Exchange 2010 Service Pack 3.

The Exchange logical configuration consists of two client access servers (CAS), three mailbox servers, one lagged mailbox server (delayed replication copy of the Exchange databases), and database availability group (DAG) failover clustering. The physical servers are all standardized on HP Proliant BL460c G7. The district has a strategic priorities document identifying its intent to transition from on-premise Exchange services to a cloud-based service, yet as of the FCMAT study, no decision had been made on the service. The district has no written email retention policy although some discussions during interviews mentioned a seven-year retention was desired.

The Exchange environment is routinely backed up using Commvault backup software with full backups performed weekly. The backup system is connected to storage that is running on the production storage area network (SAN) but there are plans to move that storage to a dedicated SAN for backup. The backup data is then transferred and stored on tape to be moved off site. The district is setting up an off-site backup recovery site in the local area, but this work was in progress and not functional at the time of the FCMAT study. The proposed site is within the district's geographical boundaries, which could pose a serious problem in case of a natural disaster.

A review of help desk tickets indicated that more than 70 were about email issues since January 2018. None were about the Exchange environment, and approximately 10 were related to client application issues. The district IT Department provides a standard computer image for the sites; however, site technicians can change this standard image, which could result in increased desktop application issues and support tickets.

The Exchange environment is monitored by SolarWinds software to track statistics from the physical server and server applications. Alerts and notifications are sent from the SolarWinds software at thresholds defined by the district. The monitoring software is not actively updated and often configuration changes and alert settings are not maintained because of the lack of staffing resources for that system.

While the Exchange systems are up to date with Exchange cumulative updates, there is no scheduled preventive maintenance period for systems and servers or policy defining a preventive maintenance schedule. As a result, IT staff routinely bypass system updates and patching. Several Exchange database outages occurred because of the duration of time the backups take and the Exchange logs not truncating.

Recommendations

The district should:

1. Restrict the ability to deviate from a standard computer image to reduce troubleshooting time and possible issues with desktop Outlook application.
2. Establish an organizational policy for and implement an IT preventive maintenance schedule for servers and services.

3. Establish a formal decision and project plan for the desired Exchange transition to the chosen cloud-based service.
4. Plan for and implement features within Exchange 2010 to reduce mailbox sizes and address online archiving email retention.
5. Create and enforce an email retention policy.
6. Review and allocate staff time to the current backup strategy for improvement of the process.
7. Dedicate staff time to maintaining and fine-tuning the SolarWinds monitoring system with a defined alerting and notification structure.

Administrative Rights, Student Email and Passwords

Teachers and district staff do not have local administrative security privileges on PC-based computers. This places unneeded dependence on technicians to fix minor problems, install updates, and install applications. At a school site meeting with administrators and teachers, a comment was made that succinctly expressed general concern: “We are a district of trust, but there is no trust by the IT Department.”

Site teachers uniformly stated that students are not given warning regarding mandated password changes or are unaware of the policies set by the IT Department concerning password changes. This often results in students being unable to login and access online resources that are required for class studies, resulting in disruption in the classrooms.

Students do not have district-provided email accounts, which causes teachers who use Google Classroom to use student private email addresses to communicate and work outside the district technology and security systems. In most districts, this is a policy violation related to student privacy and monitoring.

Recommendations

The district should:

1. Consider providing all teachers and staff local administrative rights to PC-based devices.
2. Create student email accounts on the local Exchange domain or with a service such as Google. Work with Education Services to design a user name structure that has low incidence of account conflicts and is suitable for K-12. (Example: Use student first initial, period, last name, State SSID number P.Florez1234567890@sbcusd.com)
3. Review password policies and ensure that all students, teachers, and staff follow the same rules such as the following:
 - a. A minimum length of seven characters.
 - b. At least one upper case and one lower case letter.
 - c. At least one number.
 - d. Mandatory password changes once a year.
 - e. A regular change of passwords.
 - f. All accounts archived six months after a student or employee is no longer associated with the district.
 - g. At least annual production of a report for each site and department listing active accounts and a review to locate accounts that should be removed or deactivated.

Job Descriptions and Duties

The job descriptions discussed below are presented within the areas of management, networking, and operations. When appropriate, job descriptions are presented within job families. These are a series of related job titles with progressively higher levels of impact, knowledge, skills, abilities, and other factors that provide for promotional opportunities over time.

Some job descriptions include reporting relationships, and others do not. When reporting relationships are included, the job descriptions specify that the positions are supervised by the director of IT; some positions indicate they may be supervised by an assistant director or designated lead person. Some position descriptions include the statement, “Technical/functional is provided by other managers in department, as needed.”

Required qualifications appear inconsistent among job families and when comparing jobs on similar salary ranges. Required qualifications and inconsistencies are discussed below.

Most job descriptions contain sections titled, “Job Summary” and “Supervision.” Some job descriptions contain a section titled, “Definition.”

Recommendations

The district should:

1. Establish a process for gathering IT staff input during budget development.
2. Review the job descriptions to ensure consistency in sections and language.
3. Consider aligning the qualifications for the department’s jobs. It is unusual to find more stringent requirements for lower-level positions (help desk technician) than higher-level positions (computer specialists I-III).

Management

Director of Management Information Systems (MIS)

The job description summarizes the position as: assessing, planning, organizing, directing, and monitoring the activities of the MIS Department including computer operations, help desk support, user training, applications development and system maintenance. The incumbent is to provide information management support to all district departments and provide highly complex staff assistance to cabinet-level officers. The director receives administrative direction from an assistant to the superintendent and exercises direct supervision over professional, technical, and office support staff.

Representative duties include the following:

- Directing and participating in the development and implementation of goals, objectives, policies, and procedures related to the MIS Department.
- Providing efficient and secure computer systems and services.
- Supervising, training, and evaluating MIS staff.
- Projecting MIS resource requirements.
- Evaluating new technical developments.

- Reviewing requests for additional MIS services and identifying the impacts on current and planned resources.
- Applying the cost/benefit analysis method to current and proposed applications, hardware and software.
- Selecting contractors and monitoring progress.

Qualifications include six years of increasingly responsible data processing work including administrative responsibility for a data processing staff and operations in a K-12 educational environment and a bachelor's degree with major coursework in information management, computer science, or closely related field. A master's degree is listed as preferred. The position is on range 70 of the management salary schedule. The district commonly refers to this position as the director of information technology.

No task list was provided for this position. During the FCMAT fieldwork, the incumbent's position was described as managing the IT Department. Department management included developing the budget, negotiating pricing and contracts, organizing the department to maximize efficiency, ensuring staff is trained, and managing employee/union issues.

While the job description appropriately describes the work of this position, the title does not reflect the current title of the department

Recommendations

The district should:

1. Update the position title to reflect the current department title or upgrade the position to a CTO position as described earlier in this report.
2. Assess the required qualifications for assistant director and director. Align the qualifications appropriately.

Assistant Information Technology Director

The job description summarizes the position's duties as assisting in planning, organizing, and directing the activities of the IT Department, including maintenance of existing systems, development of new systems, hardware maintenance and data processing services. Incumbents are to supervise IT staff and provide highly responsible and technical staff assistance to district staff and the department director. The incumbents receive general direction from the director of IT and exercise direct supervision over professional, technical, and clerical staff.

Job duties include the following:

- Establishing and monitoring work priorities.
- Assisting in the following:
 - The development and implementation of goals, objectives, policies, and procedures related to the IT Department.
 - The development and monitoring of the department budget, the departmental system and planning.
 - The supervision of daily operations and personnel.

The qualifications include five years of experience in data processing work, with network connected computer systems; at least one year of lead or supervisory responsibility over employees performing systems analysis, programming or LAN/WAN duties; and a bachelor's degree with major coursework in computer science, data processing, or a related field. The position is on range 63 of the management salary schedule.

There are two incumbents: one supervises the Networking group while the other supervises the Operations group.

The incumbents' task lists included the following:

- Managing and responding to emails and phone calls.
- Monitoring teams' progress on projects and emergencies.
- Performing administrative work on division assignments.
- Conducting meetings with various teams.
- Supervising, training, and evaluating staff.

During the FCMAT fieldwork, the incumbents' job was described as managing people while trying to deliver the work and projects required by other departments. At the time of the fieldwork, the assistant directors did not assist with the department budget.

The job description is aligned with the incumbents' work. There are no recommendations for this job description.

Networking

Computer Specialists Positions

Each job description of the computer specialist positions includes, "Adjust normal working schedules to perform duties when required." Computer specialist II and III also include "Assess service requests and provide resources required for the issue resolution." All computer specialist positions report to the assistant director of networking.

Each level requires a different amount of paid full-time experience. Level I requires one year of experience, Level II, two years, Level III, three years, Level IV, four years, and Level V, five years. Levels IV and V include leadership responsibilities; none of the computer specialist positions have supervisory responsibilities. Level V requires experience managing a wide area network with at least 50 servers. Levels I – III require high school graduation or the equivalent. Levels IV and V require a bachelor's degree, preferably in computer science.

Within the Networking group, separate weekly meetings are held for computer specialist I and the rest of the group. During the FCMAT fieldwork, employees stated this increased the divisiveness in the department, reduced effectiveness, and increased inefficiency. Employees acknowledged that they lack standard processes for many of their assignments.

Computer Specialist I

The job description for computer specialist I summarizes the job as providing complex technical support for the districtwide administrative applications, workstations, infrastructure and information systems. The job duties include the following:

- Assessing service requests and providing resources for resolution.
- Following procedures for installation, configuration, and deployment of technology products.
- Resolving complex problems on supported, standard products and systems.

The position is on range 40A of the classified salary schedule. The department organizational chart includes 10 computer specialist I positions; one computer specialist I position is vacant.

The incumbents included the following on their task lists:

- Set up and image new computers, diagnose nonworking computers or computer issues.
- Install, configure, test, and support PC platform operating systems.
- Act as a technical resource to assist users with resolving computer issues.
- Provide help desk duty/support.
- Perform password resets.
- Document and maintain logs, records, and reports for service tracking.
- Upgrade software, patches, and operating systems.
- Perform support testing and monitoring of networking and server enhancements.

During the FCMAT fieldwork, interviewees explained that computer specialist Is support computers for teachers, students, administrators, and other district staff. The computer specialist Is are assigned sites and departments based on district zones and to help tickets based on their zone assignments. They then have the responsibility for prioritizing their tickets and are also responsible for supporting the help desk one day a week. There was some concern that the help desk work was not an appropriate assignment for them. While the computer specialist Is set daily schedules, they may be redirected because of an absence at the help desk, or a supervisor or administrator reordering their priorities. These nonscheduled assignments affect the service they can provide to their assigned sites and departments.

The job description accurately describes the work of computer specialist Is. The assignment to the help desk one day a week is aligned with the job duty of “assessing service request and providing resources for resolution”.

Computer Specialist II

The district has a job description for computer specialist II, but there are no incumbents and no position vacancies. The job description summarizes the responsibilities as providing advance technical support for districtwide administrative applications, workstations, infrastructure, and information systems.

Representative duties include the following:

- Assess service requests and provide resources required for issue resolution.
- Establish procedures for the installation, configuration, and deployment of all products.
- Resolve advanced problems on supported standard products and systems.
- Simulate hardware and software problems to test and evaluate solutions.

The position is on range 43 of the classified salary schedule, and the job does require more advanced level of services than computer specialist I.

Computer Specialist III

The job description for computer specialist III summarizes the responsibilities as providing comprehensive technical support for districtwide administrative applications, workstations, infrastructure and information systems.

Representative duties include the following:

- Establish procedure for the installation, configuration, and deployment of all products.
- Predict and remedy all potential issues on district standard products and systems.
- Resolve all hardware and software configuration problems and errors.
- Install, configure, test, troubleshoot and support numerous platforms, and equipment.

The position is on range 45A of the classified salary schedule, and there are six incumbents. The incumbents' task lists include the following responsibilities:

- Processing network drop requests.
- Maintaining servers; troubleshooting software programs.
- Resolving urgent help desk ticket issues.
- Windows imaging, phone and Voice over Internet Protocol (VoIP) support.
- Network troubleshooting.
- Network equipment and installation audits.
- Chromebook management.

In addition, the incumbents listed special projects such as E-rate, work with school police, SOPHOS anti-virus, network firewalls, and mobile device management (MDM) from Mosyle.

During FCMAT fieldwork, the computer specialist III work was described by staff as focused on projects and assignments such as E-rate and audits. Computer specialist IIIs work on help desk tickets that computer specialist I's cannot handle. Each computer specialist III has an area of responsibility or specialty; these specialists also work together as teams when needed. The computer specialist IIIs meet weekly and use the project management software Smartsheet to keep track of progress. When the computer specialist IIIs need additional support, they request assistance from department management who then assign computer specialist Is to provide the required support.

The job description and the incumbents' work are aligned.

Computer Specialist IV

A job description for computer specialist IV is on range 52A of the classified salary schedule. The job summary states the position is to provide project leadership and comprehensive technical support for districtwide administrative/academic applications, workstations, infrastructure and other developed/purchased information systems applications.

The examples of essential functions are identical to those of computer specialist III except for one: perform the task of technical support project leader. There are no incumbents. Some interviewees stated the position has not been negotiated and approved. The job description lists an established date of July 8, 2015 and a revision date of August 5, 2015.

Computer Specialist V

The job description summarizes this position's duties as administering and designing districtwide network systems as part of the management information systems program and providing technical assistance to departmental and other managers. Essential functions include the following:

- Analyze, develop, and recommend solutions to networking and connectivity issues.
- Assist in and approve design of local area networks.
- Assist management information systems in integrating WAN and cloud systems.
- Organize, plan, and control work and projects.
- Perform the task of technical support project lead.

The position is on range 55A of the classified salary schedule, and there is one incumbent. The incumbent included the following on their task list:

- Firewall administration and monitoring.
- Cybersecurity scans.
- WAN administration.
- Vendor project management.
- Project management and acting as team lead.
- Assignment of team tasks and projects.
- Network analysis.

The incumbent's work was described to FCMAT as team leader for all the computer specialists, firewall analysis and security, supporting the team by answering questions and guiding projects. He is also responsible for facilitating the computer specialist meetings.

Recommendations

The district should:

1. Determine how often the computer specialists' schedules are revised because of emergencies or management reordering priorities. If necessary, establish department priorities and processes to ensure appropriate service to sites and departments.
2. Review the job sequence for computer specialists to determine if all five levels are needed and where each position should be placed on the classified salary schedule. Align job duties and qualifications for consistency.
3. Consider reorganizing the computer specialist meetings to ensure consistent processes, assignments, and support.

Telecommunications Specialist

The job description summarizes the responsibilities as providing support of the district's networking infrastructure comprised of telecommunications systems and data network as well as assisting in the planning and designing of data transmission networks in support of data processing systems. The position was established in October 2017 and revised in November 2017. Essential duties include the following:

Analyzing communication problems and developing alternatives and solutions.

- Consulting with systems analysts, programmers, technical support personnel, and operations management on telecommunication problems.
- Compiling data related to telecommunications.
- Designing and overseeing the installation of district communications systems.

Required qualifications include four years of experience designing, configuring and maintaining data/voice network cabling, equipment, and software and high school graduation with a bachelor's degree preferred.

The position is not on the classified salary schedule. There is one incumbent who, at the time of the FCMAT fieldwork, had been in the position for one month.

The incumbent's task list includes the following:

- Testing data communications systems and evaluating the results.
- Maintaining documentation of all hardware, serial numbers, and configurations of hardware.
- Responsibility for designing, implementing, maintaining, and analyzing telecommunications and data networks.

The incumbent was originally asked to support the network specialist working on phones because he had previous experience with phones. He began doing this work as the job description for the telecommunications specialist position was developed.

Once the job description was approved, the incumbent went through the application and selection process for the position. The incumbent observed that the job description is already outdated since it includes duties regarding teleprocessing, which has not been performed for 10 years.

Recommendations

The district should:

4. Revise the job description to reflect current district needs.
1. Place the position on the classified salary schedule.

Security Specialist

The job summary for this position states incumbents provide security, operational, technical support in resolving system/data access problems; administer security policies/procedures; diagnose/resolve security problems; and ensure the integrity, confidentiality, and availability of the district's online resources. Examples of essential functions include the following:

- Proposing changes to, implementing, and monitoring policies and procedures for security and disaster recovery.
- Assisting operations staff with the integration of production requirements regarding security, data extraction, report generation, and disaster recovery.
- Identifying issues of data compatibility to ensure adherence to policies and procedures.
- Coordinating correction of data and security issues to ensure system reliability.

The position requires two years of responsible experience performing security, operational and technical support in resolving system and data access problems. The job description states one year and 30 semester units with a major in computer sciences, security administration, or information management may be substituted for one year of experience. The position is on range 44 of the classified salary schedule. There are two incumbents. The incumbents' task lists include the following:

- Responsibilities for user accounts, roles, and passwords for financial systems and Aeries.
- Serving as user management resource administrator, monitoring firewall traffic and CPU.
- Managing website traffic and white listing websites based upon management approval.
- Establishing distribution groups in Exchange Management Console.

During the FCMAT fieldwork, the incumbents' work was described as account management, email investigation, and monitoring the firewall. The incumbents perform a lot of troubleshooting and monitor content filter. The task lists and fieldwork verify that the job description appropriately describes the incumbents' work.

There are no recommendations for this job description.

Network Specialist

The network specialist job summary states incumbents are to design, install, and maintain local area networks in support of the district technology program, provide technical support and management for district local area networks (LANs), and support internet, district databases, Windows applications, and Exchange access. Duties include the following:

- Supporting all Windows network software issues.
- Setting up, configuring, and troubleshooting network workstations and servers.
- Monitoring LAN performance and making recommendations to alleviate difficulties.
- Identifying failing network electronics and coordinating repair or replacement.
- Providing computer specialists with direct and indirect training on the use of LAN systems.

The position requires two years of full-time experience planning, designing, and administering computer networks in a NT environment and high school graduation. Microsoft Certified System Engineer or 30 semester units of college-level coursework in computer science, programming, information systems, networking or telecommunications may be substituted for the high school graduation requirement. The position is on range 52 of the classified salary schedule, and there are three incumbents.

The incumbents' task lists include the following:

- VoIP phone conversion, support and help tickets.
- LAN installation and troubleshooting.
- Laser fiche management.
- Active Directory Federation Service management for specific software/programs.
- Supporting one another on projects.
- Cybersecurity troubleshooting and data center projects.
- Security, student emails, VMWare, servers, Azure system and Microsoft licensing.

During the FCMAT fieldwork, the incumbents describe the jobs listed on the task lists and indicated they work collaboratively on one another's projects.

Staff interviews indicated that the computer specialist IV job description was almost identical to that of network specialist. While both positions are on range 52A of the classified salary schedule, the computer specialist IV position is focused on administrative/academic applications, workstations, infrastructure, and information systems applications. The network specialist position is focused on configuring, supporting, and troubleshooting LANs. While their work may overlap on occasion, the positions do not appear to be identical. The network specialist job description describes the work on the incumbents' task lists and the work discussed during the FCMAT fieldwork.

Recommendation

The district should:

1. Review the qualifications required for the position. It appears to be in error that college-level coursework or MCSE certification is listed as a substitute for high school graduation.

Operations

Data Control Clerk

The job summary for this position states the incumbents are to establish control procedures in the audit verification of student and staff data to ensure accuracy and timely submission to federal, state, or requesting departments and to provide a variety of assistance to the Assessment and Accountability and/or Information Technology departments. Representative duties include the following:

- Receive and log incoming data for state and federal requests.
- Assist in the electronic submission of data.
- Identify errors in data and ensure errors are corrected.
- Receive and compile computer generated output and verify accuracy and completeness.
- Assist in inputting data and processing output.

The qualifications for the position include two years of experience providing online data integrity support or performing data entry or updating and high school graduation. The position is on range 36A of the classified salary schedule. There are two incumbents.

The incumbents' task lists included the following:

- CALPADS research, error resolution, verification of student information, and trainings.
- California Basic Educational Data System (CBEDS) reporting.
- Resolution of errors in student information, responding to a variety of information requests.
- Working with district employees to ensure accuracy of data.

During fieldwork, the incumbents' work was described as primarily focused on CALPADS. While each incumbent has individual assignments, he or she works collaboratively to ensure the accuracy of data. The incumbents also analyze and research data to ensure accuracy. The incumbents work closely with designated staff at both schools and departments because they prefer to spend more time ensuring the data is correct rather than correcting errors after the data is analyzed.

The job description is aligned with the work described in the task lists and during the FCMAT fieldwork.

There are no recommendations for this position.

Computer Operations Technician

The job description summarizes the job as scheduling, prioritizing and processing production in the network environment and coordinating schedules and output with other departments and school sites. Examples of responsibilities include the following:

Establishing network-based applications schedules and processes.

- Scheduling and evaluating day and evening production run status.
- Prioritizing jobs.
- Dealing with users to adjust data flow or output; and reviewing new or modified applications.

The qualifications for the position include two years of experience with network servers and equipment, 12 semester units of college or professional school courses in computer science, and high school graduation. The position is on range 42 of the classified salary schedule, and there are three incumbents.

The incumbents' task lists include the following:

- Assisting with the help desk.
- Updating student attendance/enrollment.
- Grading reporting process to generate report cards.
- Uploading test scores.
- Updating A-G college entrance requirements.
- Backing up teacher gradebooks.
- Uploading student pictures.
- Processing weekly attendance percentages.
- Managing take-home Chromebook distribution.
- Testing laptops, desktops, iPads, and tablets.
- Overseeing Chromebook repair with college interns.
- Reviewing and inputting report requests.
- Setting up print jobs.
- Running macros to update student attendance.
- Providing and distributing various monthly reports for departments and sites.

During the FCMAT fieldwork, the incumbents' work was described as focused on the student information system, Aeries, and generating reports from the system. While Aeries provides some reports, the incumbents develop complex reports that Aeries does not provide.

Overseeing the take-home Chromebook program requires daily attention from at least one incumbent. Distribution, replacement, and repair are daily activities because of the number of student Chromebooks.

The job description lists essential job functions that seem to support routine processes and procedures. The task lists and fieldwork indicate that while the incumbents run routine processes and procedures, they are also responsible for developing processes and reports. This development is not included in the job description.

Recommendation

The district should:

1. Verify the work done by the incumbents and update the job description as needed.

Training Specialist

The job description defines the job as performing specialized staff development and training primarily in computer software applications but also in the customer service, new employee orientation to support district technology and staff development programs. Representative duties include the following:

- Planning, developing, coordinating, scheduling and presenting a variety of computer training classes.
- Conducting assessments for training needs.
- Evaluating existing or proposed training programs.
- Troubleshooting user computer applications problems.
- Providing training to and support of computer help desk personnel.
- Advising users of operating errors, suggesting alternate methods of microcomputer use.

The required qualifications are two years of experience developing/conducting applications software training for computer users and an associate degree or 60 semester units of college coursework. There are options listed for substituting college coursework for experience and experience for coursework. The position is on range 46 of the classified salary schedule. There are three incumbents, and their task lists include the following:

- Writing curriculum, creating manuals and developing video support.
- Editing and updating curriculum.
- Learning and becoming high knowledge users of core district applications.
- Teaching and training staff.
- Creating and maintaining training schedules and training registration.
- Handling the call system/help desk support.
- Keeping the training website updated.

During the FCMAT fieldwork, the incumbents' work was described as focused on developing and implementing training in a variety of venues. The incumbents provide scheduled training in the department labs, coach and teach remotely via phone and computers, and provide a monthly "Tips and Tricks" newsletter. There is also an easily accessible set of video trainings on more than 100 different topics covering programs such as Aeries, Excel, Adobe, Gradebook, Outlook, and Smartsheet. They also track the types of training employees have received.

The team provides training in the computer labs during the work day. The trainings are typically scheduled from either 9 a.m. to 11 a.m. or 1:30 p.m. to 3:30 p.m. The classes are often not full because staff cannot leave their regular assignments.

The job description appropriately describes the incumbents' work. There are no recommendations for this job description.

Recommendation

The district should:

1. Consider rescheduling lab training later in the day to allow staff to attend after the work day.

Help Desk Technician

The job description summarizes the position as performing complex duties serving as the primary liaison between district clients and support staff; troubleshooting and diagnosing support issues with hardware and Windows systems. Essential duties include the following:

- Assisting clients in resolving problems over the phone.
- Issuing work orders and tracking numbers.
- Consulting with technical support in resolving computer problems with network systems, services, and equipment.
- Answering telephone calls from clients.
- Troubleshooting and diagnosing support issues.

Minimum requirements include one year of full-time paid experience diagnosing and resolving technology problems and an associate degree or 60 semester units in computer technology. The position is on range 37A of the classified salary schedule. There is one incumbent.

At the time of the FCMAT fieldwork, the incumbent had been in the position for approximately one month. The incumbent's task list included the following:

- Receiving phone calls.
- Assisting users remotely with PC and/or account issues.
- Receiving and responding to help desk emails.
- Assisting parents and students with IT problems and questions.
- Troubleshooting devices like printers, laptops, desktops, and iPads.
- Assisting with software updates and installations.

During the FCMAT fieldwork, the position was described as frontline support. The incumbent frequently assigns tickets to computer specialists and notifies them of the issues when they are working in the field. The incumbent manually enters tickets into the system since it is not

possible for users to input tickets directly into the system. There is no recommendation for changes of this job description.

Applications Analysts Positions

Applications Analyst I

The job description summarizes the position as developing and programming for all applications in the districtwide operating environment with an emphasis on server-based micro computing, and assisting in the design, modification and maintenance of existing programs. Essential job functions include the following:

- Determining the steps and logic necessary to program the operation of a computer.
- Determining input and output data requirements and designing report formats.
- Determining the number of programs required for a job.
- Designing any special forms required for a job.

The qualifications include one year of experience performing systems analysis and computer programming, high school graduation, and 30 semester units of successful computer programming-related college coursework. The position is on range 46A of the classified salary schedule.

There are no incumbents and no position vacancies.

Applications Analyst II

The job description summarizes the job as analyzing, designing, and testing applications in the districtwide operating environment with an emphasis in the client server-based platforms; designing, coding, and testing programs while assisting in systems analysis and design of new applications.

Examples of responsibilities include the following:

- Analyzing program specifications.
- Designing required program logic and developing programs necessary to meet specifications.
- Coding in authorized language.
- Preparing test data and testing coded programs.
- Documenting programs.
- Designing special forms as required.

The required qualifications include two years of experience performing systems analysis and computer programming, an associate degree with major coursework in information technology application development, computer science, or closely related field. The position is on range 51A of the classified salary schedule. There are two incumbents.

The incumbents' task lists included:

- Creating uploads for applications.
- Creating complicated reports using Crystal, SQL, and Planet Press.
- Creating labels, report cards, and scans.
- Aeries scheduling, CALPADS, data integration, and dashboards.

During the FCMAT fieldwork, the incumbents explained that they divide the work: one focuses on application uploads and the other ensures the data is available.

The tasks and projects assigned are consistent with the job description. There are no recommendations for this job description.

Applications Analyst III

The job description summarizes the position as performing systems analysis and design work, including systems documentation and instruction and serving as a primary client liaison for facilitation and integration of information technology into district departments. Essential duties include the following:

- Analyzing systems to determine if a computer system is needed.
- Developing information requirements and priorities.
- Constructing detailed system designs.
- Coordinating the implementation and use of computer system.
- Assisting in directing the work of programming staff, providing overall job descriptions, output desired, input required and processing methodology.

The qualifications include three years of performing systems analysis and computer programming work and a bachelor's degree with major coursework in information technology, computer science, or closely related field. The position is on range 54 of the classified salary schedule, and there are two incumbents.

The incumbents' task lists include the following:

- Providing nutrition services with enrollment/attendance data.
- Ensuring the Edulog student transportation system is up to date with student information for busing routes.
- Implementing the data exchange for SIS; providing data for a variety of programs.
- Writing address maintenance routine for student system; mentoring college interns.
- Overseeing the upload of various test results into systems.
- Handling data integration design, development, and documentation.

During the FCMAT fieldwork, the incumbents' work was described as support of the student data system and supplying data for systems and staff members. Staff indicated there are many disparate applications that need to be coordinated with Aeries and that they have written many of lines of code and more than 300 custom reports to support the systems.

The position and job description are aligned. There are no recommendations for this job description.

The applications analyst job family demonstrates appropriate levels of responsibility for each level of the job family. Required qualifications increase appropriately with each level.

Recommendation

The district should:

1. Review the job descriptions to ensure clarity.

Applications Architect

The job description defines the job as providing project management, systems analysis, designing and programming of complex business applications at the level of project leader. The incumbent is to provide work instructions to programming staff and coordinate systems development.

Representative duties include the following:

- Directing professional programming staff in developing program logic, coding, testing, debugging, and documentation functions.
- Developing and maintaining information security systems and procedures.
- Developing and maintaining disaster control functions and procedures.
- Recommending, developing, and enforcing standards for the technical staff.
- Evaluating and maintaining the performance of computer systems and subsystems.
- Coordinating and controlling complex projects.

The position qualifications include five years of MIS programming and systems analysis and a bachelor's degree with major coursework in computer science or closely related field. Additional experience may be substituted for the required education. The position is on range 57 of the classified salary schedule, and there is one incumbent.

The incumbent's task list includes the following:

- New year start-up tasks such as updating the code tables, modifying SQL jobs, modifying SIS security, and updating automated scripts.
- Handling summer processes including providing SIS support for summer school, report and application development, and optimizing databases and scripts.
- Performing school year processes such as running mass data updates, fixing data anomalies, creating reports and custom applications, and working with vendors.

During the FCMAT fieldwork, the incumbent's work was described as ensuring all projects in the Operations section stay on track. He also creates a lot of exception reports. The incumbent is often involved when district departments purchase an application or program and then need it to work with the district's technology.

The job description specifies that the incumbent will provide work instructions and coordinate systems development. In addition, the duties include directing professional programming staff and coordinating and controlling complex projects. These types of responsibilities are more typically assigned to supervisors or managers.

Recommendations

The district should:

1. Review the job responsibilities and determine if the position is appropriately placed in the classified service. Reclassify as supervisory or management if necessary.
2. Correct the spelling of architect in the job description title.

Support

Clerk I/Bilingual Clerk I

The job description summarizes the job as performing routine clerical work in support of a school or district office, and to provide general clerical assistance to other office staff. Essential job functions include the following:

- Receiving, sorting, arranging, alphabetizing, and filing materials.
- Compiling, assembling, collating and reproducing lists, grades, figures, reports, agendas and other materials.
- Providing factual information regarding department or school matters.
- Typing and proofreading.
- Posting data.
- Assisting in compiling various records.
- Updating specialized files.
- Simple posting of fiscal records.
- Inventorying, ordering, checking, and storing supplies.

The position qualification is a high school diploma or the equivalent, and the position does not have supervisory responsibilities. The job description includes as a distinguishing characteristic that incumbents may have considerable contact with students and teachers. The position is on range 30A of the classified salary schedule, and there is one incumbent in the IT Department.

The incumbent's task list includes the following:

- Creating purchase requisitions.
- Approving invoices for payment.
- Purchasing supplies online.
- Work order creation for catering, print shop and facilities.
- Managing inventory at the warehouse.
- Managing the network interns' duties.
- Managing various records, requests and databases.

The incumbent was not available for interview during the FCMAT fieldwork.

The incumbent's task list, except for managing the network interns' duties, seems aligned with the job description. The job description includes "considerable" contact with students, but that does not appear to include managing college interns' work.

Recommendation

The district should:

1. Review the incumbent's work with interns to determine if the work is aligned with the job description. If not, consider removing this responsibility from the incumbent.

Secretary III/Bilingual Secretary III

The job description summarizes the job as performing highly responsible and complex secretarial and clerical work such as financial recordkeeping and reporting functions in support of an administrator at the director level of a district department. The position has no supervisory responsibilities but provides work instructions to secretarial and clerical personnel assigned to the incumbent's work unit.

Essential functions include the following:

- Performing a variety of complex secretarial/clerical duties.
- Providing information; composing correspondence.
- Maintaining files and records.
- Checking records and other data for accuracy, completeness, and compliance.
- Collecting data from office records.
- Preparing reports and schedules; monitoring budgets and financial data.
- Maintaining current budget information.

The required qualifications for this position are high school graduation and either three years of experience at the level of secretary or higher in the district or four years of paid experience as a secretary to an administrator of a public or private organization. The position is on range 39 of the classified salary schedule, and there is one incumbent in the IT Department.

The incumbent's task list included the following:

- Answering phone calls and responding to emails.
- Reviewing the budget with the director as requested.
- Setting up staff training.
- Running reports.
- Processing department staff absences.
- Making travel arrangements and processing travel reimbursements.
- Assisting with questions, concerns, issues, and complaints.

During the FCMAT fieldwork, monitoring staff absences and ensuring that all department members document and account for their absences was described as a significant portion of the incumbent's job. At the time of the fieldwork, the incumbent did not have responsibility for the department budget. At the time of the FCMAT fieldwork, the incumbent had been in the IT position for nine months.

The job description states incumbents should provide highly responsible and complex secretarial and clerical work. The incumbent's work, as described in the task list and during the fieldwork, does not appear to have the level of complexity described in the job description, yet the incumbent performed appropriately complex work in other district departments.

Recommendation

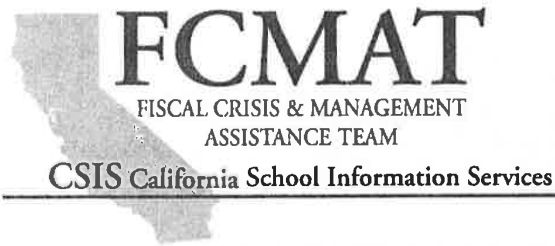
The district should:

1. Review the incumbent's current level of responsibility and work. Assign tasks and responsibilities aligned with the job description and the incumbent's capabilities.

Appendices

A: Study Agreement

Appendix A - Study Agreement



FISCAL CRISIS & MANAGEMENT ASSISTANCE TEAM STUDY AGREEMENT April 20, 2018

The Fiscal Crisis and Management Assistance Team (FCMAT), hereinafter referred to as the team, and the San Bernardino City 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

The scope and objectives of this study are to:

1. Analyze the status of the following elements of the district's technology services and make recommendations for improvement, if any:
 - a. Data center including, but not limited to, security and safety.
 - b. Staffing and organization.
 - c. Help desk process including ticketing, assignments, and resolution time.
 - d. Leadership of technology use in the district.
 - e. Project management.
 - f. Planning, and alignment of budget with plans.
 - g. Communication within the department and externally.
2. Review technology department job descriptions and alignment of duties, and make recommendations for improvement, if any.

3. Review the district's current implementation of hosted Exchange/Outlook services with a focus on recent outages. Review district planning for migration of these services to an off-premise O365 environment and make recommendations for improvement, 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.

PROJECT PERSONNEL

The FCMAT study team may also include:

<i>A. To be determined</i>	<i>FCMAT Staff</i>
<i>B. To be determined</i>	<i>FCMAT Consultant</i>
<i>C. To be determined</i>	<i>FCMAT Consultant</i>
<i>D. To be determined</i>	<i>FCMAT Consultant</i>
<i>E. To be determined</i>	<i>FCMAT Consultant</i>

PROJECT COSTS

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

- A. \$800 per day for each staff member while on site, conducting fieldwork at other locations, presenting reports or 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 \$40,900.

- 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 at 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**

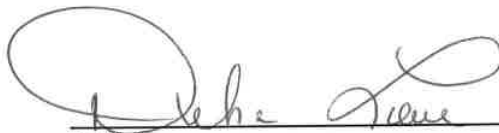
During the term of this agreement, FCMAT shall maintain liability insurance of not less than \$1 million unless otherwise agreed upon in writing by the district, automobile liability insurance in the amount required under California state law, and workers compensation as required under California state law. FCMAT shall provide certificates of insurance, with San Bernardino City 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**

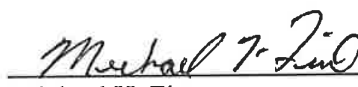
Name: Jayne Christakos
 Telephone: (909) 381-1164
 E-mail: Jayne.christakos@sbcusd.com



 Debbie Love, Purchasing Director
 San Bernardino City Unified School District

5/2/18

 Date



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

April 20, 2018

 Date