



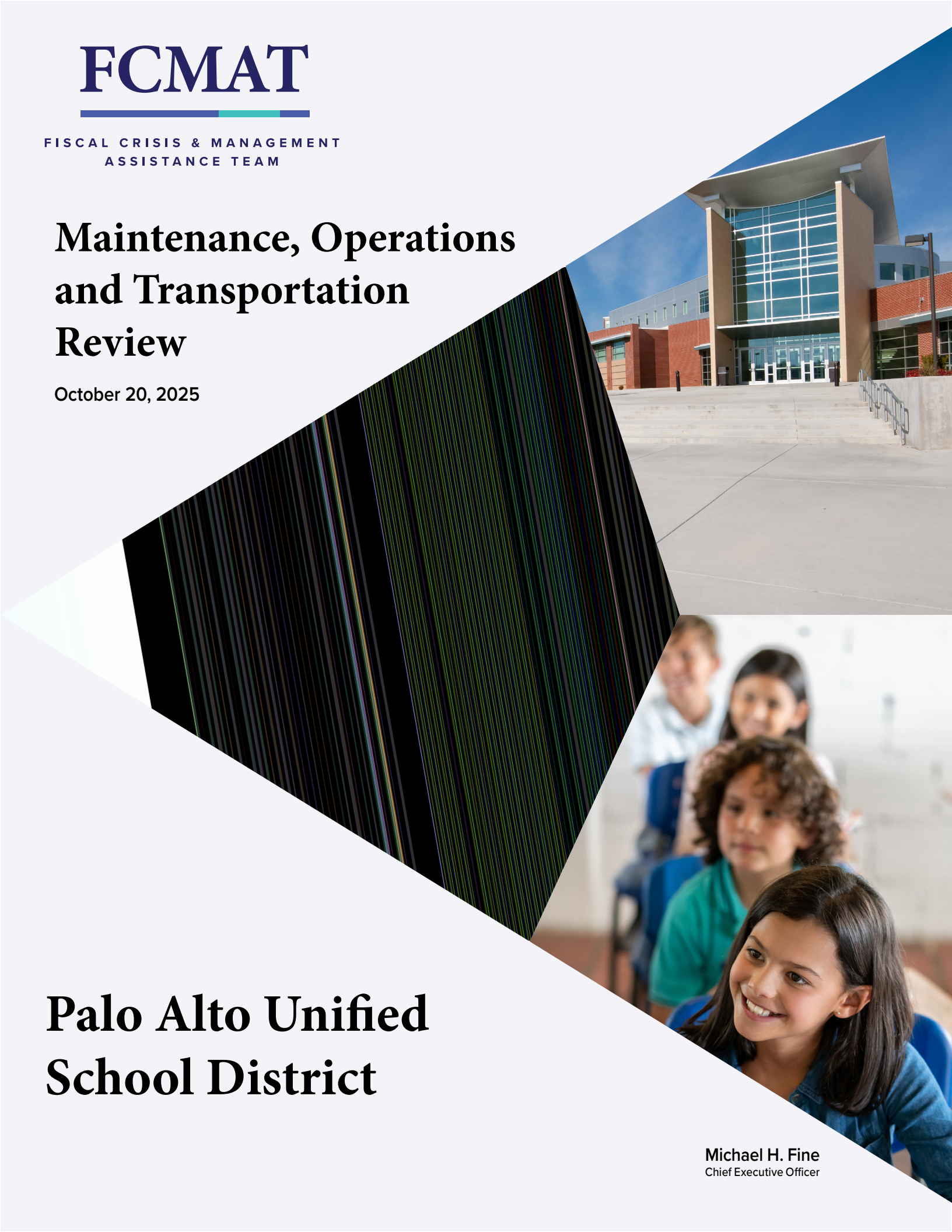
FISCAL CRISIS & MANAGEMENT
ASSISTANCE TEAM

Maintenance, Operations and Transportation Review

October 20, 2025

Palo Alto Unified School District

Michael H. Fine
Chief Executive Officer



October 20, 2025

Charen Yu
Chief Business Officer
Palo Alto Unified School District
25 Churchill Ave.
Palo Alto, CA 94306

Dear Chief Business Officer Yu:

In January 2025, the Palo Alto Unified School District and the Fiscal Crisis and Management Assistance Team (FCMAT) entered into an agreement for FCMAT to conduct a review of the district's Maintenance, Operations and Transportation Department. The agreement stated that FCMAT would perform the following:

1. Conduct an organizational and staffing review of the Maintenance, Operations and Transportation (MOT) Department, including maintenance, grounds, custodial and transportation, and make recommendations for staffing improvement or reductions, if any.
2. Evaluate the current workflow and distribution of functions in the MOT Department and make recommendations for improved efficiency, if any.
3. Review the operational processes and procedures of the MOT Department and make recommendations for improved efficiency, if any.
4. The Team will present the final report to the district's board of trustees at a public meeting following completion of the review.

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

FCMAT appreciates the opportunity to serve the Palo Alto Unified School District and extends thanks to all the staff for their assistance during fieldwork.

Sincerely,



Michael H. Fine
Chief Executive Officer

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About FCMAT

Purpose and Services

FCMAT was created by the California Legislature to help California's transitional kindergarten through grade 14 (TK-14) local educational agencies (LEAs) avoid fiscal insolvency. Today, FCMAT helps LEAs identify, prevent and resolve financial, management, program, data, and oversight challenges; provides professional learning; produces and provides software, checklists, manuals and other tools; and offers other related school business and data services.

FCMAT may be asked to provide fiscal crisis or management assistance by a school district, charter school, community college, county superintendent of schools, the state superintendent of public instruction, or the Legislature.

When FCMAT is asked for help with management assistance or a fiscal crisis, FCMAT management and staff work closely with the requesting LEA to meet their needs. Often this means conducting a formal study using a FCMAT study team that coordinates with the LEA for on-site fieldwork to evaluate specified operational areas and subsequently produces a written report with findings and recommendations for improvement.

For more immediate needs in a specific area, FCMAT offers short-term technical assistance from a FCMAT staff member with the required expertise.

To help meet the need for qualified chief business officials (CBOs) in LEAs, FCMAT offers four different CBO training and mentoring programs that consist of 11 or 12 diverse two-day training sessions over the course of a full year.

For agencies with professional learning needs, FCMAT offers workshops on specific topics. Popular topics include associated student body operations, use of FCMAT's Projection-Pro online financial forecasting software, use of FCMAT's Local Control Funding Formula (LCFF) Calculator, and data reporting for the California Longitudinal Pupil Achievement Data System (CALPADS). FCMAT staff and management also frequently make presentations at various professional conferences.

The California School Information Services (CSIS) service of FCMAT helps the California Department of Education (CDE) operate CALPADS; helps LEAs learn about CALPADS, resolve data issues and meet reporting requirements; and provides LEAs with training and leadership in data management. CSIS also developed and continues to host and improve the Standardized Account Code Structure (SACS) web-based financial reporting system for all California LEAs, and provides ed-data.org, which gives educators, policy-makers, the Legislature, parents and the public quick access to timely and comprehensive data about TK-12 education in California.

Since it was formed, FCMAT has provided LEAs with the types of help described above on more than 2,000 occasions.

FCMAT's administrative agent is the Kern County Superintendent of Schools. FCMAT is led by Michael H. Fine, Chief Executive Officer, and is funded by appropriations in the state budget and modest fees to requesting agencies.

Workshop schedules, manuals, presentation slide decks, Projection-Pro software, LCFF calculators, past reports, an online help desk, and many other resources are available for download or use at no charge on FCMAT's website.

History

FCMAT was created by Assembly Bill 1200 (Chapter 1213, Statutes of 1991) and Education Code 42127.8. Assembly Bill 107 (Chapter 282, Statutes of 1997) added Education Code 49080, which charged FCMAT with responsibility for CSIS and its statewide data management work, and Assembly Bill 1115 (Chapter 78, Statutes of 1999) codified CSIS' mission.

Assembly Bill 1200 created a statewide plan for county offices of education and school districts to work together locally to improve fiscal procedures and accountability standards. Assembly Bill 2756 (Chapter 52, Statutes of 2004) gave FCMAT specific responsibilities for districts that have received emergency state loans.

In January 2006, Senate Bill 430 (Chapter 357, Statutes of 2005) amended Education Code 42127.8, and Assembly Bill 1366 (Chapter 360, Statutes of 2005) amended Education Codes 42127.8 and 84041. These new laws expanded FCMAT's services to include charter schools and community colleges, respectively.

Assembly Bill 1840 (Chapter 426, Statutes of 2018) changed how fiscally insolvent districts are administered once an emergency appropriation has been made, shifting oversight responsibilities from the state to the local county superintendent to be more consistent with the principles of local control, and giving FCMAT new responsibilities associated with the process.

Introduction

Background

Founded in 1893, the Palo Alto Unified School District is located in the city of Palo Alto in northern Santa Clara County. The district serves primarily Palo Alto but extends into parts of Los Altos Hills and Portola Valley. Spanning approximately 42 square miles, the district operates 12 elementary schools, three middle schools, two comprehensive high schools, one post-secondary middle college school, one alternative high school, and an adult school.

Palo Alto Unified is governed by a five-member board of trustees with three additional student board members and serves approximately 10,210 students in transitional kindergarten (TK) through 12th grade. According to the 2025-26 budget presentation, the district estimates \$351,256,579 in expenditures for 2024-25 with an increase to \$354,664,924 for the 2025-26 fiscal year.

The district maintains a website at www.pausd.org. In its [Annual Report](#) dated June 2025, Palo Alto Unified reports having 1,607 high quality staff, a 15-to-1 student-to-teacher ratio, 100% access to arts, music, and library instructional programs, and over 120 career pathway electives.

In January 2025, the district engaged the Fiscal Crisis and Management Assistance Team (FCMAT) to conduct a comprehensive review of its Maintenance, Operations, and Transportation (MOT) Department. The study aims to assess organizational structure, staffing, workflow, and operational efficiency of the department.

Study and Report Guidelines

FCMAT visited the district on May 6-7, 2025, to conduct interviews with district and school staff, collect data and review documents. Following fieldwork, FCMAT held an exit meeting on May 12, 2025, and continued to review and analyze documents. This report is the result of those activities.

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 and its own short internal style guide, which emphasize plain language, capitalize relatively few terms, and strive for conciseness, clarity and simplicity.

Study Team

The study team was composed of the following members:

John F. Von Flue
FCMAT Chief Analyst

Brad Pawlowski
FCMAT Consultant

Leonel Martínez
FCMAT Technical Writer

Tim Purvis
FCMAT Consultant

Those members of this study team who are otherwise employed by a local educational agency were not representing their respective employers but were working solely as independent contractors for FCMAT.

All team members reviewed the draft report to confirm accuracy and achieve consensus on the final recommendations.

Executive Summary

The Palo Alto Unified School District has an established culture of excellence that the MOT Department has not matched. A history of inconsistent leadership in the department is thought to have fostered complacency and resistance to change. Efforts by new leadership to instill accountability and excellence are ongoing but face resistance. This resistance is thought to come from leniency that developed under past leadership but also from a lack of organization, structure and understanding of the department's vision.

Historical operational inefficiencies and a lack of accountability have contributed to excessive costs with marginal outcomes. The district has experienced significant excess service costs over its recent history due to substitutes, extra help, and overtime in addition to outsourcing, all while providing suboptimal services.

The MOT Department operates under a new split leadership model, with transportation and maintenance reporting to different cabinet members. This structure provides needed leadership but can lead to inefficiencies and unclear lines of authority.

Maintenance and operations services are largely reactive, with high overtime costs and significant outsourcing despite having skilled staff. Preventive maintenance is minimal, and the work order system is underutilized and inconsistently applied. A recent decentralization of maintenance staff was made in effort to improve site ownership but has introduced other challenges such as mismatched skills.

Grounds services are inconsistent and not in alignment with the district's high standards and image. The Grounds Department lacks service level standards and expectations, which leads to decreased accountability.

Custodial services are less than optimal due to varying accountability, leading to inconsistent cleaning standards and practices between school sites. The custodial handbook needs to be updated and implemented to provide a resource for standardized expectations and training.

Transportation services oversight is split between operations and maintenance. The operations services appear to be properly staffed, but vehicle maintenance staffing is critically low, risking noncompliance with safety regulations. Additionally, the Transportation Department does not maintain and use transportation data such as ridership to evaluate efficiency or utilize its vehicle maintenance software to track and schedule maintenance.

Overall, the MOT Department lacks structure and accountability, which is largely due to a historical absence of established expectations, procedures, training and strong leadership. In addition, the district does not maintain or use facilities and transportation data essential to good decision making.

Findings and Recommendations

Organizational Structure

The purpose of an organizational structure is to help a district's administration provide proper oversight and help improve student learning while balancing internal financial resources.¹ The organizational design should outline the management process and its specific links to the formal system of communication, authority, and responsibility needed to achieve an organization's goals and objectives. Authority in a school district originates with the governing board, which delegates its authority to the superintendent, who serves as the employer of record and has responsibility for overseeing and superintending the district. Through the superintendent, authority and responsibility is delegated to the district's administration and staff.

Management positions are typically responsible for supervising employees and overseeing the work of the department for which they are accountable. They must ensure that staff members understand all policies and procedures established by the district and perform their duties in a timely and accurate manner. A manager must also serve as a liaison between their department and others to identify and resolve problems and design and modify processes and procedures as needed. Management positions typically should not be responsible for a department's routine daily functions; these should be assigned to department support staff.

When staffing school districts, administrators should consider the basic theories of organizational structure used in other school agencies of similar size and type. The most common of these concepts include job specialization and departmentalization, authority and responsibility, chain of command, centralization and decentralization, line and staff authority, and span of control.²

Job Specialization and Departmentalization

Efficiently organized districts are usually divided by specialized task(s) and district departments. For example, business operations are usually structured to closely align with other education support departments such as maintenance and operations, facilities, food services, risk management, and others. Those departments pertaining to educational services are also aligned, including but not limited to student services, special education, and curriculum and instruction. Districts have great flexibility in determining the best fit for their organization and may structure the organization to best fit their needs.

Authority and Responsibility

Authority refers to the right to make decisions and direct the work of others. Staff must have the authority to carry out the work for which they are responsible. The superintendent is delegated by the board to serve at the highest level of authority in the district and thus holds the greatest responsibility. Delegation of authority then continues to lower levels of staff, who are given less authority and responsibility down the chain of command.

1 *Organization Theory and Design*, Richard L. Daft, South-Western College Publishing; Copyright 2001

2 *Principles of School Business Management*; R. Craig Wood, David C. Thompson, Lawrence O. Picus, and Don I. Tharpe; Association of School Business Officials International; Copyright 1995

Chain of Command

Chain of command refers to the flow of authority in an organization. Chain of command is characterized by two guiding principles: unity of command, meaning that a subordinate is accountable to only one supervisor, thus eliminating the potential for conflicting direction and instruction from a variety of supervisors; and the scalar principle, meaning that subordinates at every level in the organization follow the chain of command and communicate only through their immediate supervisor. The result is a hierarchical division of labor in the organization.

Centralization and Decentralization

The level of centralization and decentralization is a common dilemma among organizations.

Decentralization refers to the delegation of authority to lower levels, while centralization keeps authority with the top level of school administration. There are advantages to both, and typically a balance is maintained based on the level of competence and experience found in staff at the lower levels.

Line and Staff Authority

Line authority is the relationship between supervisors and subordinates and refers to the direct line in the chain of command. For example, the superintendent has direct line authority over the assistant superintendent, and the assistant superintendent has direct line authority over the staff in their department. Staff authority refers to the authority specifically delegated to each staff member by their supervisor. A school district's organizational structure establishes the framework for leadership and the delegation of specific duties and responsibilities for all staff members.

Span of Control

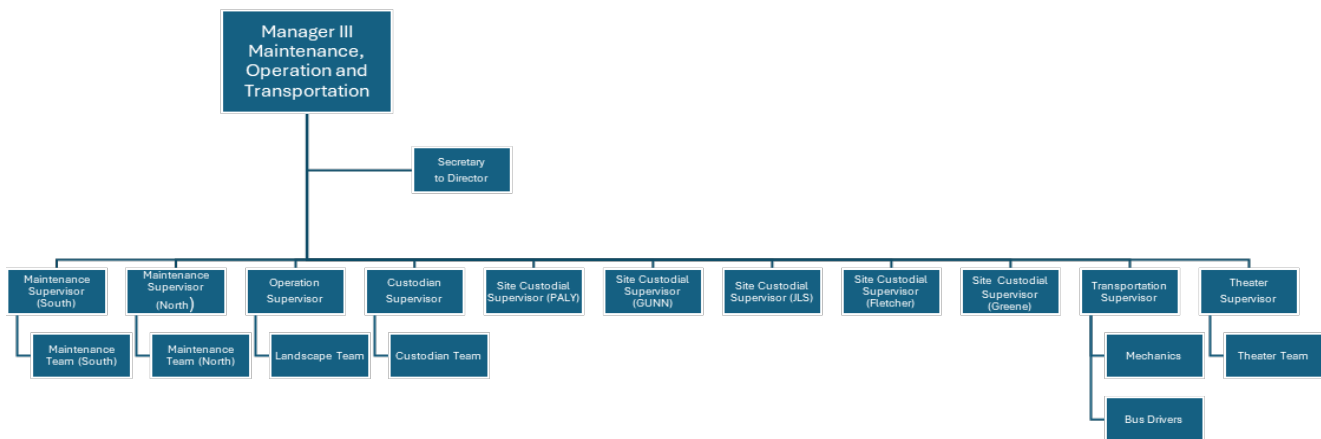
Span of control refers to the number of subordinates who report directly to a supervisor. Although there is no agreed-upon ideal number of subordinates for span of control, the span can be larger at lower levels of an organization than at higher levels because subordinates at lower levels typically perform more routine duties and therefore can be more efficiently supervised.

Maintenance, Operations and Transportation Structure

The district's maintenance, operations and transportation services have a unique organizational structure. The MOT Department is under the direction of two different executive cabinet members. Transportation operations, which includes scheduling, driver supervision and bus drivers, is under the authority of the deputy superintendent, while the Maintenance, Custodial and Operations Department reports to the chief business official. The MOT manager is responsible for facility maintenance, operations (grounds and landscaping), custodial services, and the transportation garage (responsible for vehicle and small engine maintenance.)

This line-of-authority division, which has the Transportation Department reporting to two different cabinet members, is unique and can result in conflicts within the department. This is discussed further in the transportation section of this report.

At the onset of FCMAT's engagement in March, the district provided the following organizational chart for the MOT department:

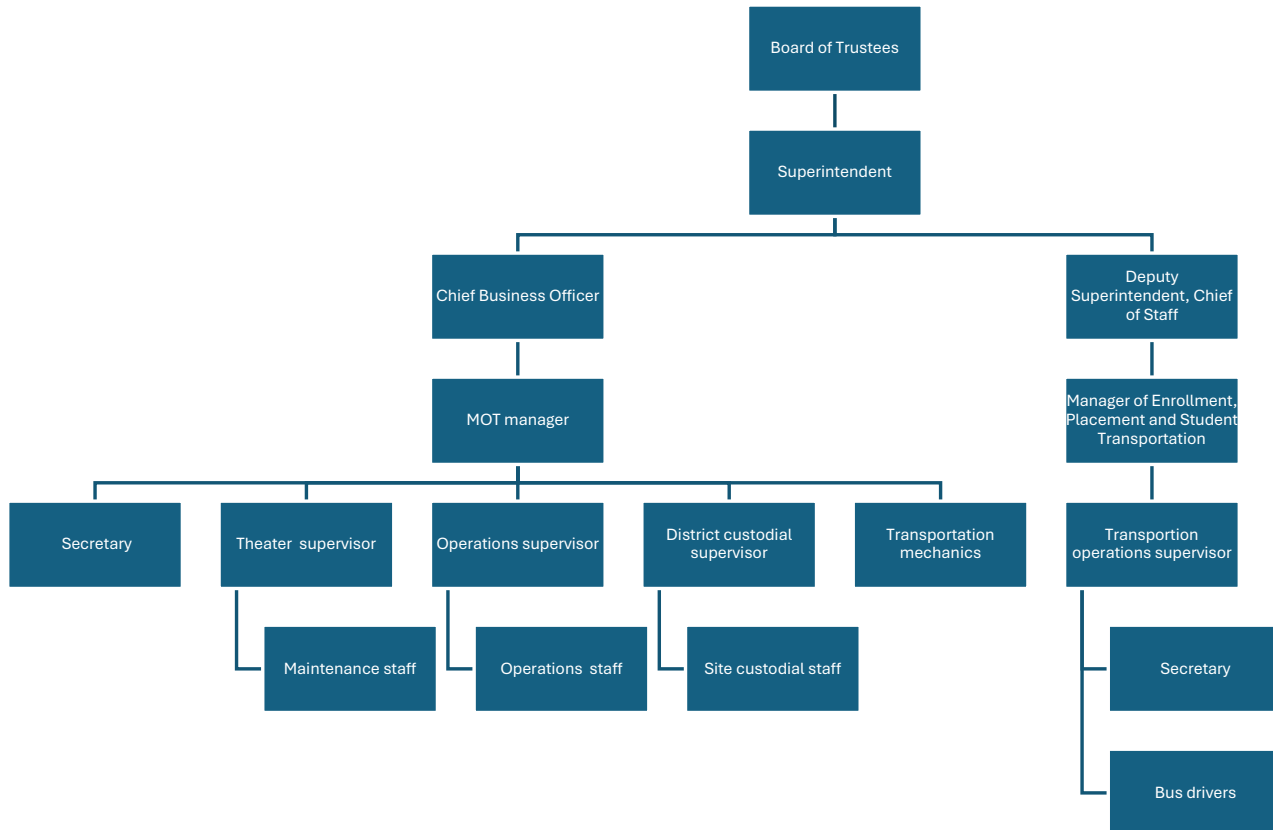


This organizational chart identified the manager III MOT overseeing the gamut of the maintenance, operations and transportation department. The chart showed the following:

- Two maintenance supervisors: one responsible for the north and one for the south.
- An operations supervisor over the landscape team.
- A custodian supervisor who oversees the custodian team and five site custodial supervisors that report directly to the manager III MOT.
- A transportation supervisor who oversees the mechanics and bus drivers.
- A theater supervisor responsible for the theater team.

However, near the beginning of FCMAT's fieldwork an "updated MOT Org Chart 4-28-25," was provided with distinct differences from the prior organizational chart.

2024-25 MOT Organizational Structure



The new chart indicated only one maintenance supervisor, an operations supervisor who was involved in supporting maintenance in addition to landscape, site custodians who reported to the district custodial supervisor, and transportation oversight split between the manager III MOT and the manager of enrollment, placement and student transportation.

Interviews indicated that a recent reorganization had occurred affecting the authority, responsibility, and span of control of the supervisors. There was also discussion of further reorganization and fine tuning of this structure.

The maintenance supervisor manages the work of the 20 maintenance staff and is the M&O representative for 14 sites. The supervisor's responsibilities include delegating work order requests to staff, providing support and training, and ensuring work completion. The supervisor also is responsible for districtwide project management to include coordinating maintenance staff with operations and custodial and outside contractors. In the past, maintenance staff were centralized and assigned to work within their specific expertise throughout the district as needed. This organization was considered inefficient as maintenance staff frequently traveled from site to site to address assigned work orders and was deemed purely reactionary. Recently, the maintenance staff were decentralized and assigned a primary work site. This is an effort to encourage more ownership of site work, support more preventive and proactive maintenance efforts for staff members' "home" site and reduce unproductive travel time between sites. However, this effort to create efficiencies and increase proactivity and ownership has led to problems because some maintenance staff lack the appropriate knowledge and skills to address the variety of maintenance needs. These challenges can create less-than-optimal work efficiencies and affect work quality.

The operations supervisor oversees 12 grounds staff and is the M&O representative for six school sites. The grounds teams maintain the landscape, trees, and fields throughout the district. Four of the staff are capable of operating tractor and backhoe equipment. The operations supervisor assigns work orders for the grounds teams and ensures they have the equipment and materials needed. The operations supervisor also oversees work quality and productivity and supports staff or contracts for specialized tasks. During interviews, concerns arose about the appropriate alignment of staff skills and assigned tasks and contracting work that could be done by staff. If a staff member is not properly skilled or trained to perform a task, it may be done inefficiently, incorrectly, and unsafely. It can also be more expensive to contract for a task when staff have the knowledge, ability and equipment to complete it.

The custodial supervisor, in conjunction with site administration, supports 68.031 FTE custodians throughout the district. The custodians report directly to their assigned sites. Each middle and high school site has a custodial supervisor, and each elementary site has a lead daytime custodian and additional custodial staff as determined by a calculation of the number of teachers, students, and classrooms. According to interviews, the district custodial supervisor assigns work schedules, accommodates absences by arranging for substitutes or adjusting individual assignments, organizes safety and job training, provides needed supplies and equipment, ensures work standards are met, and resolves issues that arise. During the school year, each site administrator has direct authority over the site custodians and can alter their work assignments to meet site-specific needs or address urgent issues. The site administrator and the custodial supervisors collaborate in an effort to enforce custodial accountability. This shared responsibility for oversight can lead to differing expectations and accountability if not properly practiced. The custodial supervisor, the site administrator and the MOT manager must have aligned expectations and accountability for this approach to be successful.

The Transportation Department is led by the manager of enrollment, placement and student transportation, who was recently appointed to oversee the transportation operations (excluding maintenance) in an effort to improve services and efficiencies in the department. The manager reports to the deputy superintendent rather than the CBO like the rest of the MOT Department. Although the manager has no transportation experience, this position brings great organization, leadership and client services skills to the department.

Recommendations

The district should:

1. Evaluate the efficacy of the organizational structures and make necessary adjustments to maximize effectiveness.
2. Ensure district standards and expectations are established and known.
3. Evaluate the skills and abilities of staff and identify the most appropriate delegation of tasks and opportunities for training. Additionally, create a process to decide when a task should be contracted.
4. Evaluate and implement a training and cross-training plan to increase staff knowledge and skills, thereby developing a more versatile and capable workforce.

Organizational Culture

Organizational culture is broadly defined as a system of shared assumptions, values, and beliefs that govern how people behave. These shared values strongly influence the people in the organization and dictate how they dress, act, and perform their jobs. Organizational culture is generally not formal but is shaped by the actions of leadership over time. Each school district possesses its own unique culture.

According to interviews and the district website, the culture of Palo Alto Unified is to be the best district in California; however, it is believed the MOT Department does not meet this standard. The culture of the Maintenance and Operations Department has evolved under changing leadership. A long-standing MOT manager left years ago, and the department has had several short-term managers since then. During these transitional years, degrees of leniency for employees have varied, creating lapses in accountability. Staff interviews indicated that the department operates with a level of complacency that prevents it from attaining excellence. Over time, the MOT Department staff have been given unique accommodations such as adjusted work hours and assignments that align with their preferred and specialty type of work. As a result, some employees avoid work by claiming that assignments are not their responsibility or refer to their positions by titles that differ from their job descriptions. Additionally, the district has begun to contract routine work orders to local vendors instead of relying on internal staff. These behaviors of decreased accountability make it difficult to align expectations with job descriptions. As a result, the Maintenance and Operations Department has not progressed in improving standards and outcomes, and its employees have been resistant to change.

The district has historically promoted internal candidates to leadership positions within the MOT Department. School districts often face significant challenges when promoting internal candidates. Such promotions can undermine staff morale and credibility in leadership since colleagues may perceive the decision as favoritism or a lack of commitment to excellence. This practice also risks reinforcing a culture of complacency, where meeting minimum expectations is seen as sufficient for advancement. Additionally, promoting staff based solely on “time served” can hinder progress on key initiatives, particularly if the new role demands specific skills such as strategic thinking, innovation, or strong interpersonal leadership.

The chief business officer (CBO) as well as the new MOT manager are trying to implement positive changes to raise the level of accountability in all operational divisions. The key to ensuring this is successful involves multiple elements:

- Shared vision.
- Effective leadership.
- Organizational culture supporting change.

Interviews indicated that staff felt these elements were not present. Line staff employees typically agree with the CBO’s and manager’s goal of improving operational services, but reasons for changes have not been fully articulated nor has there been any opportunity for input from line staff.

Both the CBO and MOT manager are new to their positions as of July 2024. The CBO was promoted from within the district. The MOT manager successfully managed MOT departments in other districts. The MOT manager is attempting to implement the organization and structure that he found successful in his prior districts and other districts throughout the area; however, this has been challenging due to the ingrained culture of the department and a staff lacking understanding of his vision. Without staff understanding and acceptance, the transition of the department will be difficult, if not impossible.

The district needs to work on closing the perceived gap between management and line staff employees. This can be done by improving communication, recognizing and rewarding staff for achievements, incorporating a sense of belonging and practicing accountability and transparency at all levels.

Recommendations

The district should:

1. Work to build relations between department management and line staff through communication to include both sharing of vision from management and seeking input from staff.
2. Continue efforts to adopt a culture of excellence in the MOT Department through consistent expectations and accountability at all levels.

Data-Driven Decisions

Data-driven decision making is essential to organizational management. The premise behind data-driven decision making is that organizations should make decisions based on verifiable facts, using logic that is communicated openly, defensible, and reasonable to objective third parties. Continuous improvement strategies require measuring present conditions or outcomes, implementing strategic changes, and measuring the results of those changes to validate the effectiveness and plan next steps. Examples of decision-making methods that are not data-driven or objective include repeating past practice regardless of results, repeating past practice even though circumstances have changed significantly, and making decisions based on intuition instead of an analysis of available information.

Improvement and evaluation studies typically involve extensive data collection to help make informed recommendations drawing from multiple sources of data and cross-validates information to ensure a complete understanding of circumstances and causes for conditions. Findings and recommendations rely on verifiable data to provide accurate analysis and meaningful information.

In conducting data collection and validation, FCMAT found that the district has almost no reliable, complete and readily accessible facilities data. At a minimum, a district seeking efficient and effective facilities management is expected to have the following basic facilities data:

- Number of classrooms.
- Current usage of each classroom space.
- Square feet of buildings.
- Total acres of athletic fields used for competitive sports.
- Total acres of fields used for recreation or sports practice.

Although more data than listed above is needed for thorough decision making, a district cannot make informed decisions about basic facilities management without at least this essential data. For example, if a district does not know how many classrooms are on each campus, it will not be able to make accurate decisions about a facility's capacity. Without basic information on square footage and usage, informed custodian schedules are not possible. Without basic data on grounds acreage, accurate grounds schedules are not possible. Without square footage data for buildings, creating benchmarks for planning energy efficiency projects or proving the value of completed projects is not possible. In addition, most preliminary construc-

tion estimates are determined based on a square footage or quantity. A district cannot make preliminary estimates for construction or renovation projects if basic square footage data is unavailable. Data is needed to inform those decisions.

The district has completed many construction projects and improvements in recent years. These construction documents can and should be used as a source of some of the needed information such as square footage and number of classrooms.

In addition, the district is underutilizing data in its Transportation Department. (See the transportation section later in this report for more information.)

Recommendations

The district should:

1. Compile comprehensive facilities data to include:
 - The square footage of each building and campus.
 - The total number of classrooms.
 - The current usage of each classroom space.
 - The total acres of athletic fields used for sports competitions.
 - The total acres of fields used for recreation and practice.
2. Establish a system to maintain and update the facilities data regularly to ensure it is available as needed.

Maintenance, Operations and Grounds

The CBO and MOT manager expressed concern over the quality and cost of services in maintenance, operations and grounds. They also believe that the department does not meet the level of service expected by the district's culture and yet, even though the services do not meet the district standard, the district has excessive costs associated with the delivery of these services. In fiscal year 2024-25, the district tallied nearly \$1 million in extra help and overtime for the department. Most maintenance positions reportedly paid at a salary range of 38-52 which, based on job descriptions, is indicative of a skilled and versatile tradesperson capable of performing "high level" work with minimal supervision. However, the district reported spending almost \$430,000 contracting for tasks, many of which the district staff should have been capable of handling.

Maintenance Services

Through Board Policy (BP) 7000, adopted 2010, "[t]he Board of Education recognizes that one of its major responsibilities is to provide healthful, safe and adequate facilities that enhance the instructional program." The maintenance service's main function is to provide for the optimal performance and reliability of district buildings and building systems, through inspection, repair, and replacement of parts and components, to meet the needs of the organization. Maintenance best serves the educational program when the facilities needed to support teaching and learning are safe and fully functional.

The Maintenance Department needs to be staffed adequately, and employees need to be trained to quickly repair or replace components or systems including, but not limited to, the following:

- Heating, ventilation, and air conditioning (HVAC).
- Electrical.
- Fire alarm.
- Telephony.
- Roofing.
- Carpentry.
- Locksmithing.
- Painting.
- Plumbing.
- Glazing.

The Maintenance Department has 20 full-time-equivalent employees on staff. The district has hired maintenance employees who possess general maintenance skills with some level of specialty but lack journeyman-level skills in specific trades. Staff interviewed expressed comfort in working general maintenance tasks and in areas where they have experience. However, with the new decentralized model, they are being asked to do a greater variety of tasks, with some assignments requiring skills they may not possess. The lack of skill has challenged the level of teamwork within the department and has even led to the attitude of "that's not my job" in some instances.

Site visits to obtain a random sample of the district's schools' conditions showed reactive maintenance. This was further confirmed through interviews with site administrators. Characteristic of this level of service

is a lack of proactive maintenance, with most work driven by site-initiated emergency work orders rather than preventive work orders. Maintenance activities appear unplanned, unorganized and staff-driven, and the level of maintenance services depends on the individual staff member addressing the issue rather than on a process-driven approach. In such case, the timeliness and quality of maintenance is largely associated with the abilities of the staff member assigned, resulting in service and maintenance requests that are not consistently responded to in a timely manner and not addressed in the most efficient and effective manner. This level of service can lead to deterioration of facilities from normal usage and lack of maintenance.

The level of staffing needed will be dependent on a trained workforce, funding, leadership structures, a formal preventive maintenance plan and an adopted level of service that is acceptable to meet the needs of students, staff, and the community.

To assist in this process, two methods are recommended:

- A thorough analysis of the current Maintenance Division positions by the Human Resources Department or an independent reviewer to determine if the current workforce is equipped to perform the essential functions of their job descriptions.
- and/or
- An extensive, trade specific training program utilizing local vendors, community colleges, and various online trainings and webinars to ensure maintenance personnel can perform the essential functions of their job descriptions.

Ongoing and Preventive Maintenance

Work Order System

The Maintenance Department processes services through an electronic work order system (SchoolDude) where site staff have access to enter work orders. The office assistant then assigns those tasks to the appropriate personnel. The manager and/or supervisor positions for operations, transportation, and grounds and/or the maintenance service logistics and compliance supervisor occasionally review work orders prior to assignment to ensure they are in alignment. The district has used this system for approximately seven years. With the current system, maintenance staff receive a printed copy of the work order and manually complete the form to document labor, material and a description of the work performed. That document is returned to the maintenance secretary who then records this information in SchoolDude. This is redundant work that creates potential for inaccuracies and does not communicate data in real time. An electronic tablet (or other similar device) could be used to document maintenance activities. Interviews indicated that staff have mixed feelings about this potential change, with a number of interviewees commenting that some maintenance personnel do not check their email or respond to messages. However, all staff members who were interviewed used smart phones daily, and utilizing a tablet device is comparable.

Interviewees expressed a common concern regarding the lack of training in proper usage of the work order system. Additionally, maintenance staff reported that the type of information recorded in the work order system varies widely based on personal preference. For example, some staff members do not make comments while others give detailed descriptions. This type of inconsistency erodes the credibility of the division. A policy to provide a consistent level of detail will ensure that the SchoolDude system is the one-stop source of knowledge regarding the work requested and completed on each work order.

District staff interviewed felt the work order system generally met district needs. A few perceived that some work orders were ignored or closed without any maintenance work performed. A review of the work

order system found that the district does not track the aging history of work orders. Additionally, detailed reports that indicate either current open work orders or the average turnaround time of work orders were not provided. Staff and administrators are not fully trained in all the functionality of the work order system. In addition, the maintenance and operations management staff does not have a method to routinely audit the turnaround time and completion rates of work orders and ensure any outstanding work orders are addressed in a timely manner.

Preventive Maintenance Plan

The district does not have a formalized formal preventive maintenance plan. Such a plan starts with a list of all facilities, the structures at each facility, and the building components and systems for each structure. Examples of building components and systems include roofs, gutters, floors, doors, plumbing valves, HVAC units and bleachers. For each building system or building component listed, the plan needs to include the monthly, quarterly, semiannual, seasonal, and yearly tasks needed to proactively maintain those systems. The plan also needs to note whether the work will be completed by district staff or contractors, and the costs associated with each task.

During interviews, staff indicated that outside contractors are used for routine repairs, at times without notifying district maintenance staff. This can result in a duplication of efforts and wasted staff resources. While it is unclear if the Maintenance Department is staffed appropriately, it is evident that the staff operates in a reactionary mode, with a run-to-fail strategy. This is a hands-off approach that keeps maintenance costs low in the short term, but will likely prove more costly in the long run. Equipment that fails without warning creates a need for immediate or emergency repair, resulting in higher costs. In addition, equipment that fails during critical times often results in unnecessary costs for mitigation or workaround measures and could create an uncomfortable, inoperable, or potentially unsafe environment for students and staff.

A comprehensive preventive maintenance plan can help prevent emergency response situations, increase facility functionality, lower operating costs, improve safety and customer satisfaction, and support accurate budget planning. At a minimum, the maintenance service logistics and compliance supervisor needs to develop an annual calendar and written procedures to manage the district's preventive maintenance priorities throughout the year in accordance with needs and available funding sources.

Recommendations

The district should:

1. Consider issuing mobile electronic tablets (or other similar devices) as a means of documenting maintenance activities in the SchoolDude system.
2. Provide training for all staff/administrators who use district-specific technology such as email and the work order system/SchoolDude.
3. Create policies and procedures that identify the level of detail that should be recorded regarding maintenance activities within the work order system.
4. Develop a method to routinely audit the turnaround time and completion rates of work orders and ensure any outstanding work orders are addressed in a timely manner.
5. Create a preventive maintenance plan that includes:
 - A department policy regarding preventive maintenance and included funding sources.

- An inventory database of all facilities and equipment that require routine preventive maintenance and care.
 - A computer database that stores and displays in chronological order the dates when equipment should be serviced or potentially replaced.
 - A financial plan, funding sources and budget codes to track preventive maintenance expenditures.
6. Develop a calendar for projects that may need to be contracted. This should be developed in concert with the district's master facility plan.
 7. Develop a program to annually update the district's facilities and inventory to document the changes that have occurred as a result of maintenance, equipment replacement, modernization, demolition of facilities, or new construction.

Deferred Maintenance

Beginning with fiscal year 2013-14, deferred maintenance program funding was incorporated into the Local Control Funding Formula (LCFF) base funding. At that same time, Education Code (EC) 17584, relating to the required district matching contribution, was repealed. Although specific funding for deferred maintenance no longer exists, the California Department of Education (CDE) allowed districts to continue using the Deferred Maintenance Fund (Fund 14) to account for district-funded deferred maintenance programs.

Deferred maintenance refers to repairs to assets and infrastructure that get delayed or rescheduled into the future due to limited resources. These are maintenance tasks that have to be completed eventually to avoid safety issues, breakdowns, or damage.

Deferred maintenance can also refer to the total dollar amount of existing maintenance repairs and required replacements (capital renewal) not accomplished when they should have been, not funded in the current fiscal year, or otherwise delayed to the future.

Implicit in these definitions is the notion that postponed maintenance will invariably carry a significant cost into the future. As a result, a resource allocation plan is needed to plan for more expensive maintenance items that require repair or replacement in the future. EC 17582 defines a deferred maintenance expenditure as follows:

... major repair or replacement of plumbing, heating, air-conditioning, electrical, roofing, and floor systems; the exterior and interior painting of school buildings; the inspection, sampling, and analysis of building materials to determine the presence of asbestos-containing materials; the encapsulation or removal of asbestos-containing materials; the inspection, identification, sampling, and analysis of building materials to determine the presence of lead-containing materials; and the control, management, and removal of lead-containing materials.

In this respect, deferred maintenance addresses specific building components and evaluates life cycle costs for each to determine when the components should be replaced. Often, a deferred maintenance plan can be integrated with a district's facilities routine maintenance plan or with plans for periodic modernization.

During fieldwork, deferred maintenance items were observed at each school visited. These needs include worn carpeting; hardwood floors that need to be refinished; worn interior and exterior paint on buildings; obsolete lighting and lighting fixtures; missing or damaged ceiling tiles and evidence of leaking roofs;

antiquated heating, ventilation, and air conditioning systems; broken door closers; cracked concrete; and crumbling asphalt.

The district needs to develop a comprehensive deferred maintenance plan. A complete deferred maintenance plan is extensive and contains, at a minimum, the following components:

- A list of all facilities.
- A list of all building systems for each facility (this list will likely mirror the building systems list noted and used to develop the preventive maintenance plan).
- The original construction or reconstruction date of the building system.
- The typical life expectancy of the building system.
- The current condition of the building system.
- The restoration or replacement tasks needed to ensure the facility functions as designed, along with the timing intervals for each.

For fiscal year 2024-25, the district budgeted \$453,488 for deferred maintenance projects but as of March 2025, had not spent or encumbered any funds from this budget. However, the district budgeted \$5.66 million in routine repair and maintenance (RRMA) of which, as of February 2025, it has spent or encumbered over \$5.4 million.

Recommendations

The district should:

1. Develop and maintain a comprehensive five-year deferred maintenance plan and allocate funds in its annual budget to address its most significant deferred maintenance needs.
2. Identify, allocate and use funding sources, including RRMA funding and other sources, to address ongoing maintenance needs.

Operations Services

Grounds Services

Success in grounds management depends on dependable, well-trained personnel with skills in a variety of areas. Like other maintenance and operations functions, staffing for grounds-related services tends to vary among school districts throughout the state. The most common factors affecting staffing levels for grounds crews at individual schools include the following:

- The school size in acreage.
- The number and types of outdoor spaces to be maintained.
- The type and extent of natural and hardscape features.
- The extent to which grounds crews perform unrelated tasks.

The district needs to determine the desired level of service and use this to develop standards and expectations. For example, the Association of Physical Plant Administrators (APPA) identifies levels of service

from level 1, state-of-the-art, to level 5, minimum level maintenance. Once a service level is determined, the staffing level can be evaluated and adjusted to meet the standard.

The district has 12 FTE staff in the Grounds Department, two of which, at the time of this study, were covered by long-term substitutes as the district attempts to fill those positions.

As noted earlier, the district could not provide the total square footage or acreage of each site. This is the most common metric used for maintenance, custodial and grounds staffing formulas. Without this data, the district will not be able to staff appropriately or compare its staffing levels using agreed-upon industry standards.

During site visits, FCMAT observed suboptimal grounds conditions. This is indicative of either insufficient staffing and/or lacking proper supervision, training and accountability. Site administrators acknowledged that the turf was mowed irregularly and haphazardly.

Because the district could not provide the detailed data required for a staffing needs analysis for grounds personnel, only general recommendations can be provided in this area. The district will need to continue to review and update school site data so staffing needs can be considered based on the composition of each school and the personnel needed to maintain at least safe and healthy school grounds.

Grounds Plans

Integrated Pest Management (IPM)

Per AR 3514.2, “[t]he Superintendent or designee shall designate a staff person to develop, implement and coordinate an IPM program that incorporates effective, least toxic pest management practices.” The district did not provide any documents indicating how or who maintains pest control. The decision about whether to perform pest control in-house or contract for it varies from district to district; however, the decision should be reviewed periodically to ensure the best use of resources. Important factors in this decision are the training and licensing requirements for in-house staff, and the equivalency of staff and other resources expended.

Contracting for pest control services does not absolve the district from reports and documentation to ensure compliance with the Healthy Schools Act of 2000, California Department of Pesticide Regulation, and county agricultural commission rules.

Information from interviews and a lack of documentation indicates that the district does not comply with Healthy Schools Act requirements. During interviews, some leaders expressed an inconsistent understanding of Healthy Schools Act requirements. The leadership team in the MOT Department will need to take Healthy Schools Act training and ensure that all employees in the Grounds Department sufficiently understand compliance requirements.

Tree Care Plan

BP 3513.4 states that “[t]he Board of Education values trees on our school campuses as an important part of creating a healthy and sustainable environment for students, faculty, staff and the community.”

MOT department leaders reported no system for planning tree care or safety pruning. The district’s schools have many trees, some of which are large and many of which are close to areas frequented by students. The district needs to solicit the development of a tree care plan from a certified arborist. A comprehensive tree care plan will catalog and map the locations of all trees taller than six feet or greater than 1.5” in trunk diameter at chest height; and it will document and make recommendations for all of the following param-

eters: tree species, irrigation needs (if any), pest control needs (if any), fertilization needs, frequency of inspection need, frequency and type of trimming work needed, and potential safety concerns. For any trees the size, age, or condition of which indicates a safety risk, an American National Standards Institute (ANSI) A300 (Part 9) Tree Risk Assessment will need to be completed by a certified arborist. Having a tree care plan in place will improve campus safety and aesthetics and facilitate budget planning.

Turf Care Plan

The Grounds Department maintains a variety of turf areas including ornamental lawns, athletic practice fields, and fields used for competitive sports and community events. Many of the turf areas are in poor condition and do not meet the community's expectations.

MOT department leaders indicated there was a mow schedule. However, site administrators reported no systematic approach to turf maintenance.

The district needs to solicit the development of a turf care plan from an outside provider for each type of turf area maintained. A well-developed turf care plan will include all of the following components:

- Turf area.
- Grass species.
- Intended use (light athletics, heavy athletics, ornamental only, etc.).
- Appearance requirements.
- Irrigation requirements (in inches of water per week, per season).
- Seasonal mowing heights.
- Aeration schedules.
- Overseeding schedules.
- Soil testing protocol.
- Soil amendment schedules.
- Fertilization schedules.
- Use limitations.

In addition to the written components of the plan, the district will need a map that identifies which turf areas are subject to which turf care plan. A plan like this may sound aspirational to a district that is struggling with understaffing. However, the district's understaffing only heightens the need for a turf care plan, because such a plan will enable the district to focus its limited resources. The alternative to a well-defined plan is a haphazard response and degrading grounds conditions.

Recommendations

The district should:

1. Gather and compile detailed data on school site grounds composition to aid in evaluating staffing needs and assignments based on the composition of each school to maintain safe and healthy school grounds.
2. Use task-based or needs-based scheduling for grounds staffing based on accurate, detailed data for each school site, and allocate adequate staffing to support those identified needs.
3. Evaluate the cost and benefit of contracting with external vendors for pest control services versus an in-house staffing equivalent.
4. Ensure the department leaders attend Healthy Schools Act training, and ensure all direct reports have a sufficient understanding of compliance requirements.
5. Solicit the development of a tree care plan by a certified arborist.
6. Have department leaders train staff in the proper use of weed control products.
7. Solicit the development of a turf care plan that addresses all of the key elements for proper maintenance for each type of turf area maintained, and that is accompanied by site maps that identify all turf areas subject to the plan.

Custodial Services

The organizational structure of the district's Custodial Division is considered site-based. All custodians report to the site principals. However, the district also has a district-based custodial supervisor. This person supports principals and site custodians and has typically worked a day shift. At the time of fieldwork, the custodial supervisor began a rotating shift to assist in supervision of the night custodians.

There is no optimal number for determining the span of control. The nature of the work, the size of the organization and the attention each subordinate requires must be considered. Role confusion was observed during site visits. Site administrators acknowledged the supportive role of the custodial supervisor; however, they did not always understand how that position was involved in supervising, evaluating and managing custodial positions.

A natural consequence of this is a lack of standardization throughout the district. When custodians were asked about cleaning times, cleaning procedures, and cleaning priorities, their answers were inconsistent and had only a loose connection to industry standards. When questioned about the amount of cleaning time allocated per classroom, answers ranged from five to 25 minutes. This broad range underscores the lack of standard cleaning procedures or schedules. During interviews, the MOT manager discussed the need to improve standardized training and expectations for custodial staff through the use of a custodial handbook. Examples of handbooks from other districts were being reviewed as a foundation to develop a handbook for the district.

Many custodial staff members have been employed in the district for many years and hold a vast array of historical knowledge. However, this institutional knowledge has not been translated into an up-to-date policies and procedures manual. Without policies, procedures and standardization, the district has been unable to maintain a unified cleaning expectation. This lack of procedures has also created inefficiencies when new employees are hired or when substitute employees are used. These two groups of employees frequently are left to learn their responsibilities with little or no formalized training.

The district would benefit from finalizing and implementing a district-level custodial handbook. Such a handbook would enable the district to:

- Conduct training specific to industry best practices.
- Conduct employee discipline and performance evaluations.
- Audit work schedules.

As is the case with most districts, a hybrid supervision model is optimal to support custodial oversight. The hybrid model includes a coordinated evaluation procedure with the custodial supervisor and the site-based administrator. The custodial supervisor should evaluate the technical skills of the employee, which would include cleaning methods, vacuuming, dusting, mopping, stain removal, glass cleaning, sink cleaning, efficient use of time, etc. The site administrator would then evaluate the “people” or “soft” skills of the employee including interactions with staff, students, community, attendance, dependability, work attitude, etc. During site visits, some site administrators commented that they do not feel comfortable evaluating technical skills because they are not trained or familiar with the requirements of custodial operations and lack the level of expertise needed to effectively assess performance or provide procedural guidance. The information above is not all-inclusive of the process but instead is designed to provide suggestions to indicate how a dual-input evaluation could be performed. Using this method will increase the standards of care and raise the level of accountability of custodial employees.

Processes and Procedures

While there is no nationwide standard for cleanliness, the U.S. Department of Education has established five levels of cleaning. Each level of cleaning presumes that an eight-hour shift includes two 15-minute breaks, a 30-minute lunch break, and the custodian has been provided the proper supplies and equipment.

- Level 1 cleaning results in a spotless and germ-free facility as might normally be found in a hospital or corporate suite. At this level, a custodian can clean approximately 10,000 to 11,000 square feet in an eight-hour shift.
- Level 2 cleaning is the uppermost standard for most school cleaning and is generally reserved for restrooms, special education areas, kindergarten areas, or food service areas. This level of service for classrooms includes vacuuming or mopping floors daily and sanitizing all surfaces. At this level, a custodian can clean approximately 18,000 to 20,000 square feet in an eight-hour shift.
- Level 3 cleaning is the norm for most school facilities. It is acceptable to most parties and does not pose any health concerns. Classrooms are cleaned daily, which includes dumping trash, emptying pencil sharpeners, and cleaning sinks if applicable. Vacuuming floors and sanitizing frequent contact surfaces such as door handles are alternated every other day. At this level, a custodian can clean approximately 28,000 to 31,000 square feet in an eight-hour shift.
- Level 4 cleaning is not normally acceptable in a school environment. Classrooms would be cleaned every other day, carpets would be vacuumed every third day, and dusting would occur once a month. At this level, a custodian can clean approximately 45,000 to 50,000 square feet in an eight-hour shift.
- Level 5 cleaning can very rapidly lead to an unhealthy situation. Trash cans may be emptied and carpets vacuumed weekly. One custodian can clean 85,000 to 90,000 square feet in an eight-hour shift.

The figures above are estimates, and the actual number of square feet that a custodian can clean per shift will depend on variables such as the type of facility, flooring, wall coverings, the number of windows, restroom layout, gym and athletic facilities, offices, and community use.

The district needs to develop and adopt cleaning standards and expectations for custodial work, based on the five levels described above. These standards need to be developed collaboratively and include a range of employees from cabinet level members to site-based custodians. Once these standards are created and adopted by the governing board, detailed work schedules can be created to ensure that adequate time is planned to complete the required tasks.

Site visits and interviews indicate that the district cleans below the level 2 or 3 standards expected for schools. This lack of cleanliness appears to be the result of departmental inefficiencies, and undefined and inconsistent cleaning expectations and standards.

Equipment

While the study team was not provided a list of district equipment, interviews indicated there is an adequate supply of equipment for all staff. Additionally, interviews found a lack of uniformity in the type of equipment provided to each site and that employee preference was a factor when ordering or replacing equipment. The lack of uniformity creates a challenge when training substitute custodians, making repairs

to equipment and establishing procedures that maximize efficiency. The district also loses purchasing power when ordering random pieces of equipment rather than purchasing multiples. The district would benefit from maintaining an equipment replacement plan that focused on minor repairs until the equipment has reached the end of its life cycle and then seeking discounts in purchasing multiples of replacement standardized equipment.

The district does not maintain an equipment inventory list, which demonstrates a breakdown in inventory management. One of the best ways to effectively track equipment is by performing maintenance checks. Equipment control is not a one-time job; it requires perpetual tracking. The district should designate a certain time each quarter or yearly to conduct a physical count and verify equipment inventory.

Staffing

Implementation of the custodial standards noted above requires proper staffing levels. The California Association of School Business Officials (CASBO) custodial staffing formula, which the district uses to allocate staffing, considers the square footage of sites and the number of students, classrooms, and teachers to determine the number of full-time equivalents (FTE) needed to provide the level 2 standard of cleaning. The following four formulas are considered:

- One custodian for every 325 students.
- One custodian for every 13 teachers.
- One custodian for every 13 classroom units.
- One custodian for every 18,000 square feet of educational space.

The average of these four formulas provides a starting point FTE. Site-specific and district-specific issues may be considered for allocations, which vary from the formula recommendations. This staffing formula is based on industry standards and has been widely used to analyze custodial staffing levels in schools throughout California.

As mentioned before, the district could not provide the total square footage of each site. The district did provide a copy of custodial staffing allocation based on this formula; however, it could not confirm the accuracy of the source data. These are the most common metrics used for custodial staffing formulas. Without accurate data, the district will not be able to staff appropriately or compare its staffing levels using agreed-upon industry standards. Once the district has calculated the most current square footage of all district facilities using the above calculation, it will be able to determine the appropriate staffing level.

Recommendations

The district should:

1. Ensure custodial staff have sufficient materials and equipment to accomplish their work.
2. Establish a level of service that the district wishes to maintain for its facilities. When that level of care is established, adjust custodial staffing as needed to attain that level of care.
3. Develop and formally adopt written cleaning standards and expectations for custodial work, including daily, weekly and monthly duties.
4. Establish standards before creating work schedules so that the schedules can include adequate time to complete the tasks required.

5. Update and implement the custodial handbook that establishes the district's expectations.
6. Train custodial staff on the information contained in the custodial handbook and how to meet the expectations.
7. Review each custodial assignment using the level 2 and level 3 standard, with specific direction about which areas require which level of care, to ensure that workloads are evenly distributed among custodial staff.
8. Develop and implement a site inspection tool to reinforce the district's newly-adopted standards and provide a fair mechanism for inspecting and improving work quality.

Transportation

According to BP 3540, the district’s “board of education desires to provide for safe and efficient transportation of students to and from school as necessary to ensure student access to the educational program, promote regular attendance, and reduce tardiness.”

Due to the district’s relatively small and densely populated geographic footprint, the overall demand for pupil transportation is not high. The district operates a total of 21 bus routes, consisting of 13 special education routes and eight general education routes. In addition, the transportation program supports a large majority of the district’s extracurricular and cocurricular activity trips (field trips).

Staffing

In 2024-25, the district’s Transportation Department has the positions listed in the table below.

Position	FTE	Notes
Transportation Supervisor	1.0 FTE	
Transportation Secretary	1.0 FTE	
State Certified School Bus Instructor	1.0 FTE	Vacant – currently external contracted position
Dispatcher	1.0 FTE	
School Bus Driver(s)	16.1 FTE	All school bus drivers are 7 hr. contracts
Mechanics*	2.0 FTE	1 mechanic recently transitioned out of district; another has elected to take an early retirement incentive in June 2025
Light Duty Mechanic*	1.0 FTE	Lacks medium/heavy duty journeyman level experience
	23.1 Total FTE	

*Assigned to the MOT manager

Given the district and transportation program size, the number of support positions appears adequate apart from vehicle maintenance.

Historically, the entire Transportation Department was under the leadership of the MOT manager. However, the district has reassigned oversight responsibilities to the manager of enrollment, placement and student transportation, reporting to the deputy superintendent/chief of staff, who supervises the operations side of the transportation program, including school bus drivers and office support staff. Meanwhile, the vehicle maintenance team and fleet management responsibilities remain under the administration of the MOT manager.

The district’s pupil transportation program is small, making its placement under a maintenance, operations, and transportation (MOT) model appropriate. This structure is consistent with the organizational models used by many districts of comparable size and scope. However, the division of administrative oversight — assigning transportation operations and vehicle maintenance to different administrators — is highly unusual. This split creates the potential for a loss of continuity between the operations staff and drivers and the vehicle maintenance team. Effective pupil transportation requires close coordination between routing processes and vehicle maintenance, as the two functions are closely interdependent in ensuring reliable service for students. The district needs to consider evaluating whether splitting administrative oversight within the same student support area results in improved efficiency or leads to operational inefficiencies.

The district's vehicle maintenance staffing is critically inadequate, particularly given the pending changes identified during the site visit. Title 13, Section 1232 of the California Code of Regulations (13 CCR 1232) requires that school buses undergo safety inspections every 45 days or 3,000 miles. Due to the anticipated staffing shortage, the district will soon lack a qualified mechanic to perform even these mandatory inspections, let alone address routine preventive maintenance and daily repair work orders for both the school bus and support fleets. To ensure compliance and maintain operational safety, the district needs to immediately explore contracting with a qualified mobile vehicle maintenance provider. This contractor should be capable of conducting 45-day/3,000-mile inspections, performing air brake system repairs and adjustments, and addressing other necessary maintenance and repairs for the school bus fleet.

Given the size of the district's fleet, the vehicle maintenance team needs to include at least two journeyman-level mechanics with experience in medium- and heavy-duty vehicles and a thorough understanding of both federal and state school bus safety regulations. In addition, maintaining a light-duty mechanic on staff is logical and valuable, as this role can focus on essential routine services such as oil changes, lubrication, filter replacements, and minor repairs — tasks critical to keeping the fleet operational daily.

The district's current vehicle maintenance staffing levels and the lack of appropriately experienced mechanics present significant concerns. Insufficient staffing or a lack of qualified personnel could compromise student safety, increase the risk of missed or incomplete 45-day/3,000-mile inspections, and lead to an unsatisfactory terminal inspection rating by the California Highway Patrol. Furthermore, the absence of a well-documented preventive maintenance program raises serious questions about whether comprehensive inspections are performed consistently or properly recorded.

A qualified mobile vehicle maintenance provider could offer immediate support to address these risks. A thorough review of all vehicle maintenance position descriptions is needed, with position criteria updated to attract and recruit experienced medium- and heavy-duty mechanics, preferably those with a background in school bus maintenance. This would ensure the district's fleet is maintained to the highest safety and compliance standards.

A review of the district's vehicle maintenance position description found that the journeyman-level heavy-duty mechanic is not required to hold a Commercial Driver's License (CDL) Class B with a passenger endorsement. Without a CDL Class B license with a passenger endorsement, an individual cannot legally operate commercial vehicles, including school buses, on public roads for purposes such as maintenance-related testing, diagnostics, and repairs. Therefore, the journeyman-level heavy-duty mechanic job description needs to be revised to require this licensure and also emphasize core competencies such as expertise in air-brake systems.

Since the Santa Clara region is one of the most competitive markets in the state for recruiting experienced heavy-duty mechanics, particularly those with school bus maintenance experience, it is critical that the district position itself to attract and retain qualified candidates. To be competitive, it is not recommended that the district require mechanics to obtain a California Special Driver Certificate for school bus operation. Such a requirement would likely result in these staff being reassigned to drive duties, thereby detracting from their primary responsibilities in maintaining the district's school buses and support fleet vehicles. Additionally, the district may need to perform a compensation comparison for this mechanic position holding the required licenses and certification.

Recommendations

The district should:

1. Consider evaluating whether splitting administrative oversight between two cabinet members results in improved efficiency or leads to operational inefficiencies.
2. Immediately explore contracting with a qualified mobile vehicle maintenance provider that can conduct 45-day/3,000-mile inspections, perform air brake system repairs and adjustments, and address other necessary maintenance and repairs for the school bus fleet.
3. Conduct a thorough review of all vehicle maintenance position descriptions.
4. Include the requirement to possess a CDL with passenger endorsement on all district vehicle maintenance technician position descriptions.
5. Ensure that it assesses and aligns its compensation structure with the market before initiating recruitment.

Program Model

The district could not provide data on the number of students transported daily. Routine processes for tracking student transportation, such as maintaining student counts and recording mileage, are either non-existent or the data is simply not collected.

While the district's student information system, Infinite Campus, includes a transportation tab that identifies students who have indicated interest in transportation and meet eligibility requirements under district administrative regulations, it does not appear to track which students use transportation services on any given day.

The district's transportation software, although limited in functionality, can identify eligible students and assist in assigning them to specific routes and buses. However, staff reported that the software has historically not been used to its full capacity. Other modules, such as those for tracking school bus driver training and annual proficiency requirements — and possibly vehicle maintenance — have been only partially used.

The district operates 21 school bus routes. Of these, 13 routes are primarily dedicated to transporting special education students who receive transportation services as part of their individualized education programs (IEPs). The remaining eight routes serve general education students. Seven of these general education routes are operated under the Tinsley Voluntary Transfer Program, established by a court order several decades ago. The eighth route, known as the "Stanford West" route, is a fee-based service supporting one elementary, one middle, and one high school, with both morning and afternoon service. Staff reported that the fee for this service is \$1,040 per student.

Due to a lack of ridership data, the approximate costs per student and student load ratios could not be calculated.

The district's routing software has limitations. Extracting eligible student data, importing it into the routing system, and optimizing bus loads based on regional areas and acceptable ride times can be cumbersome and inefficient. Although the software is capable of assigning students to routes, the process is not user-friendly.

Recommendations

The district should:

1. Evaluate alternative routing software that offers more intuitive navigation and better supports the development of efficient routing models.

Vehicle Maintenance

Inspections

The California Highway Patrol (CHP) Motor Carrier Inspector Unit conducts annual inspections of school buses, maintenance records, driver records, timekeeping records, and federal drug and alcohol training compliance. These inspections result in a “Safety Compliance Report/Terminal Record Update,” commonly referred to as the terminal grade.

The district’s most recent annual terminal inspection results are as follows:

- 12/07/2023: Satisfactory.
- 12/01/2024: Satisfactory.

A “Satisfactory” grade is the highest rating awarded, indicating compliance with all applicable laws and regulations governing school bus safety. This is effectively a transportation safety report card for the district. Conversely, an “Unsatisfactory” grade is serious and could lead to recommendations for revoking the district’s motor carrier operating authority, legal action, and potential criminal charges for district leadership if deficiencies are not addressed. Upon validation of the district’s most recent two annual terminal inspections FCMAT found that, although vehicle maintenance is satisfactory, the district received an unsatisfactory finding for its preemployment and random drug and alcohol program compliance. Most often, the federally required drug and alcohol oversight is handled by the Human Resources Department, with assistance for reporting and monitoring through a third-party vendor. The district needs to immediately review its established internal procedures for assuring compliance with the federal Department of Transportation (DOT) drug and alcohol preemployment and random testing practices, and ensure driver registration in the federal commercial operator clearinghouse that monitors the drug and alcohol program.

Fleet Maintenance

The district operates its own school bus fleet and is responsible for all fleet maintenance. A recent service schedule indicates that the district operates approximately 31 school buses and six passenger vans. Of the 31 buses, 12 are larger Type I school buses, while 19 are smaller Type II buses, primarily used for curb-to-curb transportation services for special education students. The fleet also includes two zero-emission electric school buses, acquired through recent federal and state grant programs.

The vehicle maintenance team is not effectively using the TransTraks vehicle maintenance module. As a result, preventive maintenance schedules and routine repair work orders are not managed through the system. Staff indicated that preventive maintenance services and the required 45-day/3,000-mile safety checks are instead tracked manually. It also appears that the district maintains only one preventive maintenance schedule, referred to as “Schedule A,” which is used to perform and document all 45-day/3,000-mile safety inspections as well as any other maintenance services.

Staff reported that, because of the district's relatively low annual fleet mileage, the required 45-day/3,000-mile inspections are primarily tracked by days rather than mileage. Although this practice may seem appropriate given the district's small geographic footprint, extracurricular and cocurricular trips can cause certain buses to accumulate mileage more quickly than expected, increasing the risk of overdue inspections.

To strengthen vehicle maintenance operations and ensure regulatory compliance, the district should fully utilize the existing TransTraks vehicle maintenance module or consider transitioning to another industry-standard fleet management system. A more robust tracking platform would provide comprehensive management of preventive maintenance schedules, safety inspections, repair work orders, and parts inventory, thus enhancing fleet reliability and operational efficiency.

A complete district fleet inventory detailing individual vehicle mileage was not provided; therefore, a mileage accumulation analysis could not be conducted. However, the district's bus fleet is aging, with the newest buses from model year 2021 and the oldest from model year 2000, resulting in an average fleet model year of 2010. Additionally, no evidence of a formal fleet replacement schedule or long-term replacement plan was found. Without a plan, the district may not be fully aware of the aging of its fleet, may miss bus replacement grants and/or incentives, and incur unexpected major expenses. To support strategic planning and budgeting, the district needs to develop a comprehensive fleet replacement schedule to project the financial impact of systematically replacing vehicles over time.

Recommendations

The district should:

1. Ensure compliance with all applicable requirements for oversight of preemployment and random alcohol and drug testing requirements, and of its federal Department of Transportation clearinghouse for commercial operators.
2. Fully utilize the existing TransTraks vehicle maintenance module or consider transitioning to another industry-standard fleet management system.
3. Develop a comprehensive fleet replacement schedule to project the financial impact of systematically replacing vehicles over time.

Driver Training and Safety

School Bus Driver Training

School bus driver training in California is highly regulated. Pursuant to EC 40080-40089, prospective school bus drivers are required to complete a minimum of 20 hours of classroom training and 20 hours of behind-the-wheel training, using a curriculum developed by the CDE's Office of School Transportation (OST). Typically, classroom training takes approximately 35 hours to cover all the units, and behind-the-wheel training requires a similar amount of time. In accordance with EC 40084.5, school bus drivers must also complete at least 10 hours of annual in-service training.

All annual classroom and behind-the-wheel training sessions must be conducted by a state-certified school bus driver instructor. Additionally, behind-the-wheel training may also be administered by a designated behind-the-wheel instructor, another classification of instructor allowed by law and certified by the OST.

The district has an established position for a state-certified school bus driver instructor; however, the position is vacant. The existing supervisor, who is also a certified instructor, announced plans to leave the district in June 2025. At the time of this review, the district was contracting with an external state-certified school bus instructor to provide original and renewal training for California Commercial Driver and school bus special driver certificates. This includes coordinating driver examinations and certifications with the California Department of Motor Vehicles and the CHP school bus testing officer for Santa Clara County.

Additionally, the district contracts with the same external instructor to deliver the state-mandated annual in-service training, ensuring all drivers complete the minimum 10 hours required each year. Staff indicated that most district drivers meet all or part of this annual training requirement during a school year kickoff program held the week before classes begin.

While the current arrangement with the external instructor is adequate, the district needs to consider the potential advantages of recruiting and filling the vacant state-certified school bus instructor position internally. Additionally, the district could assess the bus drivers to determine if there is sufficient interest and, if so, support selected employees in attending the California Department of Education Office of School Transportation certification program to expand internal instructional capacity.

Alternative Passenger Vehicle Use

Effective July 1, 2025, new legal requirements took effect under Senate Bill 88 (SB 88), signed by the governor on October 7, 2023. This legislation amends EC 49406 and adds Article 5 (beginning with Section 39875) to the Education Code, relating specifically to pupil transportation.

Under EC Section 39877, with few exceptions, any district employee who transports students in district-owned passenger vehicles must meet the requirements outlined in EC 39875. This will necessitate significant updates to the district's policies, procedures, and training requirements — not only for van drivers but for all employees involved in student transportation using district vehicles. Additionally, all vendors providing transportation services under contract with the district will be required to comply with the same standards.

The district incorporates passenger vans into its student transportation routing model. The use of alternative passenger vehicles is appropriate and common, particularly when transporting one or a few students to distant, specialized programs or when behavioral support needs dictate smaller vehicle use. However, the district did not provide evidence that it has formally adopted the requirements of SB 88 and EC Section 39877, nor has it updated or created administrative procedures to ensure proper oversight of employees operating district-owned passenger vehicles.

To ensure legal compliance and protect student safety, the district needs to immediately work with Human Resources to adopt the necessary policies and implement staff training specific to the use of alternative vehicles, as required under EC 39877.

Recommendations

The district should:

1. Consider the potential advantages of recruiting and filling the vacant state-certified school bus instructor position internally.

2. Assess any interest among its school bus drivers for possible attendance at the OST certification program for state certified school bus instructors.
3. Immediately work with Human Resources to adopt the necessary policies and implement staff training specific to the use of alternative vehicles, as required under EC 39877.

MOT Processes and Procedures

Purchasing

Interviews indicated an inconsistency in what purchasing procedures are considered acceptable. The procurement authority varies, and the preapproval process vacillates between written and verbal approval. Additionally, some trades maintain excessive stock of on-hand material while other trades made purchases as needed. These types of erratic procedures do not ensure timely, efficient, or economic procurement of material. The district should consider developing a policy that identifies acceptable procurement procedures that strive to obtain the best pricing yet maintain codes of conduct, procurement authority, cost/price analysis, and record-keeping.

Inventory

The Maintenance Department keeps various equipment and repair parts on hand with the maintenance staff. No inventory was provided or, therefore, reviewed for this study. Following industry best practice, the district needs to maintain an inventory of all equipment and supplies including maintenance vehicles. This is a critical step to determine the efficiency of the department. Without an estimated inventory value or stock report, the district may purchase additional equipment or tools that are not needed.

While maintaining a warehouse of maintenance related repair parts appears to be an effective way to save money, often the cost of operation, potential for theft, or obsolescence or damage of supplies can outweigh actual savings experienced in bulk rate purchases. The district should identify materials and parts that offer the greatest savings and help ensure the lowest impact to school sites. For other supplies, the district may want to consider just-in-time (JIT) options. Vendors can offer competitive pricing on common inventory items and deliver them directly to the location in need. JIT can be more expensive when comparing individual items, but the waste due to lost or aged materials is less, and the convenience and availability of goods is greater.

Uniforms/ID Badges

The district's maintenance and operations staff are provided with standard uniforms; however, staff do not consistently wear them. Requiring all members of the department to wear the district-supplied uniform would identify staff members as employees of the district and allow students, staff, and the community to readily identify their role, responsibility and authority. Uniforms also create a unified appearance and foster a sense of unity among the staff. Wearing uniforms also prevents the employee's personal clothing from being damaged while mixing chemicals or working with machinery. Further, while the district provides identification badges, employees do not wear them regularly. All district employees need to wear their identification badges to ensure identifiability and improve security.

Recommendations

The district should:

1. Develop a department policy and procedure for procurement of materials and supplies.
2. Complete an inventory of the district facilities, vehicles and equipment.
3. Require the MOT staff to wear district-provided uniforms and identification badges.

Training

Safety

Interviews indicated that safety trainings occur regularly, and personal protective equipment (PPE) is available as needed. However, no evidence was found for training in materials safety and on the use of Safety Data Sheets, which contain information on how to properly and safely handle hazardous materials and chemicals. BP and AR 4257 commit to the establishment of an injury and illness prevention program as required by Labor Code 6402. Interviews also indicated a lack of awareness of this program. The lack of established safety plans and training can create an unsafe workplace environment, putting staff at risk of injury or illness. In addition, should accidents occur, appropriate response could avoid further exposure and limit the extent of the injury or illness. Safe work conditions and proper safety training helps reduce accidents and potential harm to employees and provides a basis of accountability for employees to work safely and create a safe work environment.

Procedures

The MOT Department lacks documented and implemented procedures for its work processes. The district has a custodial handbook (undated) and an operations handbook (June 2014), but only the MOT manager was aware of its existence. Properly developed handbooks should identify district standards, provide processes and procedures to follow, and establish expectations of workmanship and of staff. Once established, all staff need to be trained sufficiently to meet the expectations efficiently, safely and with quality results. Without documented expectations, procedures and training, it is difficult to establish consistent accountability and outcomes.

Recommendations

The district should:

1. Establish and implement safety training and accountability to include but not be limited to proper handling of equipment and materials, including safety data sheets.
2. Develop and implement an Injury and Illness Prevention Plan.
3. Update and implement procedural manuals/handbooks to serve as a resource of district standards and expectations and to establish consistency in staff accountability and outcomes.
4. Train all staff on district expectations and skills needed to meet the expectations.

Appendix

A: Study Agreement

FCMAT

FISCAL CRISIS & MANAGEMENT
ASSISTANCE TEAM

FISCAL CRISIS & MANAGEMENT ASSISTANCE TEAM STUDY AGREEMENT FOR MANAGEMENT ASSISTANCE

This study agreement, hereinafter referred to as Agreement, is made and entered into by and between the Fiscal Crisis and Management Assistance Team, hereinafter referred to as the Team or FCMAT, and the Palo Alto Unified School District, hereinafter referred to as the Client; collectively, FCMAT and Client are hereinafter referred to as the Parties. This Agreement shall become effective from the date of execution hereof by FCMAT.

1. BASIS OF AGREEMENT

FCMAT provides a variety of services to local education agencies (LEAs) as authorized by bhhhEducation Code (EC) 42127.8(d). The Client has requested that the FCMAT assign professionals to study specific aspects of the Client's operations. The professionals will include FCMAT staff and may include professionals from county offices of education, school districts, charter schools, community colleges, other public agencies or private contractors. All professionals assigned shall work under the direction of FCMAT. All work shall be performed in accordance with the terms and conditions of this Agreement.

FCMAT will notify the Client's county superintendent of schools of this Agreement.

2. SCOPE OF THE WORK

A. Scope and Objectives of the Study

1. Conduct an organizational and staffing review of the Maintenance, Operations and Transportation (MOT) Department, including maintenance, grounds, custodial and transportation, and make recommendations for staffing improvements or reductions, if any.
2. Evaluate the current workflow and distribution of functions in the MOT Department and make recommendations for improved efficiency, if any.
3. Review the operational processes and procedures of the MOT Department and make recommendations for improved efficiency, if any.
4. The Team will present the final report to the district's board of trustees at a public meeting following completion of the review.

B. Services and Products to be Provided

1. Orientation Meeting
The Team will conduct an orientation session at the Client's location to brief the Client's management and supervisory personnel on the Team's procedures and the purpose and schedule of the study. This orientation meeting is normally held at the beginning of fieldwork for the study.

2. Fieldwork

The Team will conduct fieldwork at the Client's office and/or school site(s), or other locations as needed. Limited fieldwork may also be conducted remotely via telephone or videoconferencing services, in addition to the Public Safety Considerations outlined in Section 13 below.

3. Exit Meeting

The Team will hold an exit meeting at the conclusion of the fieldwork to inform the Client of the status of the study. The exit meeting will include a review of the scope of work; outstanding items, including documents, data and interviews not yet received or held; and the estimated timeline for a draft report. The meeting will not memorialize details regarding findings because the Team's conclusions may change after a complete analysis is finished. Exceptions to this will be findings of immediate health and safety concerns for students or staff, and other time-sensitive items that include the potential for risk or exposure to loss.

4. Exit Letter

Approximately 10 business days after the exit meeting, the Team will issue an exit letter briefly memorializing the topics discussed in the exit meeting.

5. Draft Report

An electronic copy of a preliminary draft report will be delivered to the Client's point of contact identified below for review and comment.

6. Final Report

An electronic copy of the final report will be delivered to the Client's point of contact and to the Client's county superintendent of schools following completion of the study. FCMAT's work products are public and all final reports are published on the FCMAT website.

7. Board Presentation

Presentations to the Client's board are optional and are made at the request of the Client. If a board presentation is requested, it will be noted in the scope and objectives of the study or can be added as a change in scope at a later date.

8. Follow-Up Review

If requested by the Client within six to 12 months after completion of the study, FCMAT, at no additional cost, will assess the Client's progress in implementing the recommendations included in the report. This follow-up support is primarily a document review-based study. Progress in implementing the recommendations will be documented to the Client in a FCMAT management letter. FCMAT will work with the Client 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 the date of the final report.

3. **PROJECT PERSONNEL**

The personnel assigned to the study will be led by a FCMAT staff person (job lead) and will include at least one other professional. FCMAT will notify the Client of the assigned personnel when the fully executed copy of this Agreement is returned to the Client.

FCMAT will communicate to the Client any changes in assigned project personnel.

4. **PROJECT COSTS**

The cost for studies requested pursuant to EC 42127.8(d)(1) and 84041 shall be as follows:

- A. \$1,200 per day for each FCMAT staff member while on site conducting fieldwork. The cost of independent FCMAT consultants will be billed at their daily rate for all work performed. On-site is defined as either 1) physically at the Client's office or school site(s), or 2) in a scheduled virtual meeting with the Client's personnel, representatives or others associated with the scope of work pursuant to Section 13 below.
- B. All out-of-pocket expenses, including travel and its associated costs, and miscellaneous items necessary to complete the scope and objectives of the study.
- C. The applicable indirect rate at the time work is performed on the study will be added to all costs billed.
- D. The Client will be invoiced for 50% of the not-to-exceed cost shown below following completion of fieldwork (progress payment) and the remaining amount shall be due upon the issuance of the final report or presentation to the Client's board, whichever is later (final payment). The Parties agree that changes documented in a revised study agreement may change the original not-to-exceed amount shown below. If changes are made before or during fieldwork, the new not-to-exceed amount documented in such a revised study agreement will constitute the basis for the progress payment. If changes are made after fieldwork, 100% of the total changed value documented in a revised study agreement, less progress payments made, will constitute the final payment due. All payments shall be due immediately based on the terms of the invoice.

Based on the scope and objectives of the study, the total not-to-exceed cost of the study will be \$45,000.

- E. Any change to the scope of work will affect the total cost. Changes may include, but are not limited to, delays, revisions to the scope of services, and substitution or addition of personnel. The need for changes shall be communicated by FCMAT to the Client in advance in the form of a revised study agreement.

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

5. RESPONSIBILITIES OF THE CLIENT

- A. Return current organizational chart(s) that show the Client's management and staffing structure with the signed copy of this Agreement. Organizational charts should be relevant to the scope of this Agreement.
- B. Provide private office or conference room space for the Team's use during fieldwork.
- C. Provide for a Client employee to upload all requested documents and data to FCMAT's online SharePoint repository per FCMAT's instructions. Provide FCMAT with the name and email of the person who will be responsible for collecting and uploading documents requested by FCMAT with the signed copy of this Agreement.
- D. Provide documents and data requested on the Team's initial and supplementary document request list(s) by the date requested.

All documents and data provided shall be responsive to FCMAT's request, in quality condition, readable and in a usable form. With few exceptions, documents and data requested are public records and records maintained by LEAs in the routine course of doing business. Some data requested may require exporting LEA financial system reports to Microsoft Excel or another usable format agreed to by FCMAT.

All documents shall be provided to FCMAT in electronic format, labeled as instructed by FCMAT. Upon approval of this Agreement, access will be provided to FCMAT's online SharePoint repository, to which the Client will upload all requested documents and data.

- E. Ensure appropriate senior-level staff are available for the orientation and exit meetings.
- F. Facilitate access to requested board members, officers and staff for interviews.
- G. Facilitate access to requested information and facilities to include, but not be limited to, files, sites, classrooms and operational areas for observation.
- H. Review a draft of the report and return it to FCMAT by the date FCMAT requests with any comments regarding the accuracy of the report's data or the practicability of its recommendations. The Team will review this feedback in a timely manner and make any adjustments it deems necessary before issuing the final report.
- I. Return the requested evaluation survey to FCMAT as described below.

6. PROJECT SCHEDULE

Time is of the essence. The Parties acknowledge that the goal of the scope and objectives of the study under this Agreement is to produce a timely and thorough report that adds value for the Client. To accomplish this goal, the Parties agree to communicate and mutually agree to honor established time commitments. These commitments include the Client providing requested documents, setting and keeping interview appointments and returning comments on the draft report consistent with the established project schedule.

The following project schedule milestones will be established by FCMAT upon receipt of a signed Agreement from the Client:

ACTION	TIMELINE
FCMAT provides the Client with a draft Agreement.	Draft Agreements are usually provided within 20 business days of the Client's initial request for services.
Client returns partially executed Agreement to FCMAT along with the applicable organizational chart and the name and email of the person who will be responsible for collecting and uploading documents requested by FCMAT.	Draft Agreements are valid for 30 business days.
FCMAT returns a fully executed Agreement to the Client and identifies the project schedule and the lead and other personnel assigned to the job.	Within five business days of the Client's return of the signed Agreement.
Client uploads initial requested documents and data to FCMAT's online SharePoint repository.	Within 10 business days of the Client's receipt of the FCMAT document and data request list.
Fieldwork	Mutually agreed upon; usually, to commence within 10 business days of FCMAT's receipt of requested documents and data.
Orientation meeting	First day of fieldwork.
Exit meeting	Last day of fieldwork.
Follow up fieldwork, if needed (e.g., rescheduled interview, additional interviews).	Mutually agreed upon; usually, within five business days of FCMAT's request.
Client uploads supplemental documents and data to FCMAT's online SharePoint repository.	Within two business days of the Client's receipt of FCMAT's supplemental document and data request(s).
Draft report submitted to the Client.	To be determined, usually, within eight weeks of the conclusion of fieldwork and receipt of all documents and data requested.
Client comments on draft report	Within 10 business days of FCMAT providing a draft report to the Client.

The Client acknowledges that project schedule deadlines build upon and are contingent on each previous deadline. Missed deadline dates will affect future deadline dates and ultimately the timing of the final report. For example, if the Client does not provide requested documents and data by the specified date, the fieldwork may not be able to proceed as originally planned.

FCMAT acknowledges that the Client has an educational program to administer, is balancing many priorities, and in some cases may have records management difficulties, staffing

capacity issues, staff on various types of leave, or other circumstances, all of which will affect the project schedule.

The Parties commit to regular communication and updates about the study schedule and work progress. FCMAT may modify the usual timelines as needed.

7. COMMENCEMENT, TERMINATION AND COMPLETION OF WORK

FCMAT will commence work as soon as it has assembled an available and appropriate study team, taking into consideration other jobs FCMAT has previously undertaken, assignments from the state, and higher priority assignments due to fiscal distress. The Team will work expeditiously to complete its work and deliver its report, subject to the cooperation of the Client and any other related 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 report. In the absence of extraordinary circumstances, FCMAT will not withhold preparation, publication and distribution of a final report once fieldwork has been completed.

Prior to completion of fieldwork and upon written notice to FCMAT, the Client 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 Client does not provide written notice of termination prior to completion of fieldwork, the Team will complete its work and deliver its final report and the Client will be responsible for the full costs.

FCMAT may terminate this Agreement at any time if the Client fails to cooperate with the requested project schedule, provide requested documents and data and/or make staff available for interviews as requested by FCMAT.

8. INDEPENDENT CONTRACTOR

FCMAT is an independent contractor and is not an employee or engaged in any manner with the Client. 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 Client in any manner without prior express written authorization from an officer of the Client.

9. RECORDS

The Client understands and agrees that FCMAT is a state agency and all FCMAT reports are public records and are published on the [FCMAT website](#). Supporting documents and data in FCMAT's possession may also be public records and will be made available in accordance with the provisions of the California Public Records Act.

FCMAT has a records retention policy and practice, and every effort will be made to maintain records related to this Agreement in accordance with this policy.

10. CONTACT WITH PUPILS

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

11. 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 Client, automobile liability insurance in the amount required by California state law, and workers' compensation as required by California state law. Upon the request of the Client and receipt of the signed Agreement, FCMAT shall provide certificates of insurance, with the Client named as additional insured, indicating applicable insurance coverages.

12. HOLD HARMLESS

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

13. PUBLIC SAFETY CONSIDERATIONS

Whether due to public health considerations, extreme weather conditions, road closures, other travel restrictions or interruptions, shelter-at-home orders, LEA closures or other related considerations, at FCMAT's sole discretion, the Scope of Work, Project Costs, Responsibilities of the Client, and Project Schedule (Sections 2, 4, 5 and 6 herein) and other provisions herein may be revised. Examples of such revisions may include, but not be limited to, the following:

- A. Orientation and exit meetings, interviews and other information-gathering activities may be conducted remotely via telephone, videoconferencing, or other means. References to fieldwork shall be interpreted appropriately given the circumstances.
- B. Activities performed remotely that are normally performed in the field shall be billed hourly as if performed in the field (excluding out-of-pocket costs that can otherwise be avoided).
- C. The Client may be relieved of its duty to provide conference and other work area facilities for the Team.

14. FORCE MAJEURE

Neither party will be liable for any failure or delay in the performance of this Agreement due to causes beyond the reasonable control of the party, except for payment obligations by the Client.

15. EVALUATION

In the interest of continuous improvement, FCMAT will provide the Client with an evaluation survey at the conclusion of the services. FCMAT appreciates the Client's honest assessment of the Team's services and process. The Client shall return the evaluation survey within 10 business days of receipt.

16. CLIENT CONTACT PERSON

The Client's contact person designated below shall be the primary contact person for FCMAT to use in communicating with the Client on matters related to this Agreement. At any time when this Agreement or FCMAT's process requires that FCMAT send information, document request lists, draft report or final report, or when FCMAT makes other requests for the Client to act upon, this is the person whom FCMAT will contact. The Client may change the contact person upon written notice to FCMAT's job lead assigned to the study.

Name: Charen Yu, Chief Business Official

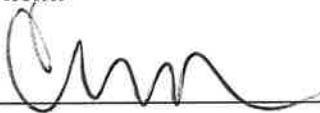
Telephone: (650) 329-3808

Email: cyu@pausd.org

17. SIGNATURES

Each individual executing this Agreement on behalf of a party hereto represents and warrants that he or she is duly authorized by all necessary and appropriate action to execute this Agreement on behalf of such party and does so with full legal authority.

For Client:



Charen Yu, Chief Business Official
Palo Alto Unified School District

11/13/25

Date

For FCMAT:

Michael H. Fine

Digitally signed by Michael H. Fine
Date: 2025.01.13 16:20:55 -08'00'

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

Date