

FCMAT

FISCAL CRISIS & MANAGEMENT
ASSISTANCE TEAM

Maintenance, Operations and Transportation Review

February 15, 2023



Armona Union Elementary School District

Michael H. Fine
Chief Executive Officer

February 15, 2023
Xavier Piña, Superintendent
Armona Union Elementary School District
11115 C St.
Armona, CA 93202

Dear Superintendent Piña:

In July 2022, the Armona Union Elementary 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 (MOT) Department. The agreement stated that FCMAT would perform the following:

1. Conduct an organizational and staffing review of the 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 within the MOT department and make recommendations for improved efficiency, if any.
3. Review the operational processes and procedures for the MOT department and make recommendations for improved efficiency, if any.

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

FCMAT appreciates the opportunity to serve the Armona Union Elementary School District and extends thanks to all the staff for their assistance during fieldwork.

Sincerely,



Michael H. Fine
Chief Executive Officer

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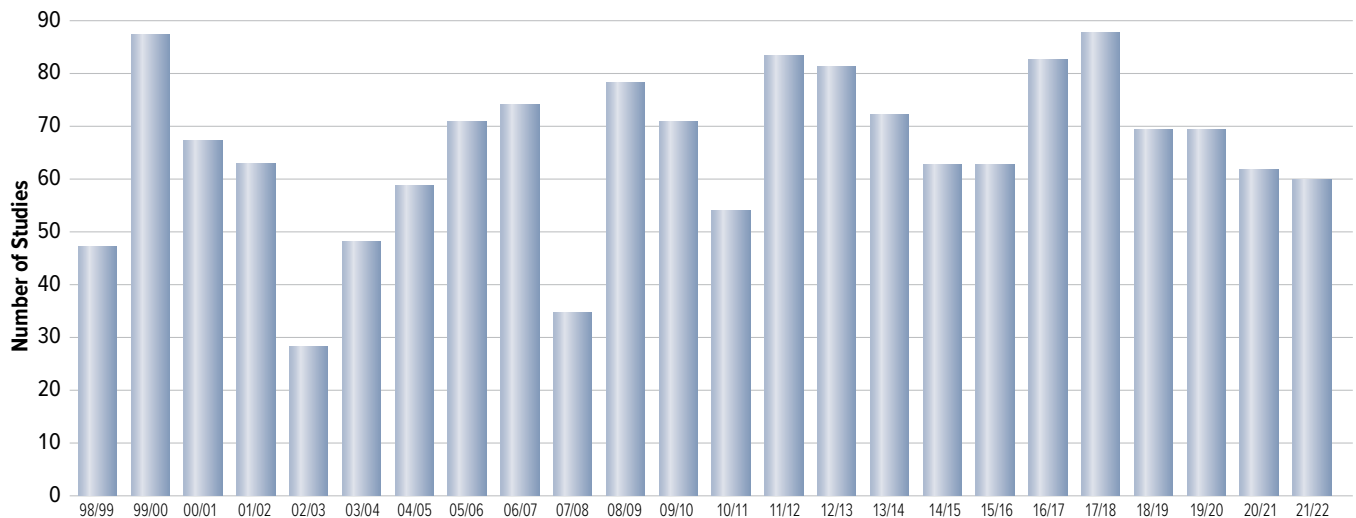
About FCMAT

FCMAT’s primary mission is to assist California’s local TK-14 educational agencies to identify, prevent, and resolve financial, human resources and data management challenges. FCMAT provides fiscal and data management assistance, professional development training, product development and other related school business and data services. FCMAT’s fiscal and management assistance services are used not just to help avert fiscal crisis, but to promote sound financial practices, support the training and development of chief business officials and help to create efficient organizational operations. FCMAT’s data management services are used to help local educational agencies (LEAs) meet state reporting responsibilities, improve data quality, and inform instructional program decisions.

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

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

Studies by Fiscal Year



FCMAT has continued to make adjustments in the types of support provided based on the changing dynamics of TK-14 LEAs and the implementation of major educational reforms. FCMAT also develops and provides numerous publications, software tools, workshops and professional learning opportunities to help LEAs operate more effectively and fulfill their fiscal oversight and data management responsibilities. The California School Information Services (CSIS) division of FCMAT assists the California Department of Education with the implementation of the California Longitudinal Pupil Achievement Data System (CALPADS). CSIS also hosts and maintains the Ed-Data website (www.ed-data.org) and provides technical expertise to the Ed-Data partnership: the California Department of Education, EdSource and FCMAT.

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

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

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

On September 17, 2018 AB 1840 was signed into law. This legislation changed how fiscally insolvent districts are administered once an emergency appropriation has been made, shifting the former state-centric system to be more consistent with the principles of local control, and providing new responsibilities to FCMAT associated with the process.

Since 1992, FCMAT has been engaged to perform more than 1,400 reviews for LEAs, including school districts, county offices of education, charter schools and community colleges. The Kern County Superintendent of Schools is the administrative agent for FCMAT. The team is led by Michael H. Fine, Chief Executive Officer, with funding derived through appropriations in the state budget and a modest fee schedule for charges to requesting agencies.

Introduction

Background

Located in Kings County, the Armona Union Elementary School District serves the unincorporated area surrounding Armona to the north and south of state highway 198 between the cities of Hanford and Lemoore. The district has a five-member governing board and, as of 2021-22, an enrollment of 1,107 students at three schools: Armona Elementary School (grades TK-4), Parkview Middle School (grades 5-8), and Crossroads Charter Academy (grades TK-12). The district also sponsors one independent charter school, California Virtual Academy at Kings (grades TK-12), which serves approximately 600 students. In 2021-22 (the latest data available), the district's unduplicated count of English learner, socioeconomically disadvantaged and foster youth students was 90.8% of the total enrollment at the district's two traditional (noncharter) schools.

The district provides transportation for approximately 300 general education students on four bus routes every day except Wednesdays and other minimum days, when it runs five routes to accommodate shorter schedules. The district contracts with the Kings County Office of Education for certain special education transportation services. The district covers approximately 40 square miles of flat and mostly rural terrain.

Study and Report Guidelines

In July 2022, the Armona Union Elementary School District and the Fiscal Crisis and Management Assistance Team (FCMAT) entered into an agreement for FCMAT to conduct an organizational and staffing study of the district's Maintenance, Operations, and Transportation Department, including an evaluation of its workflow and distribution of functions and a review of operational processes and procedures.

FCMAT visited the district on October 10 and 11, 2022 to conduct interviews with district and school site staff, collect data and review documents. Following fieldwork, FCMAT continued to review and analyze the information collected. 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, a comprehensive guide to usage and accepted style that emphasizes conciseness and clarity. In addition, this guide emphasizes plain language, discourages the use of jargon and capitalizes relatively few terms.

Study Team

The study team was composed of the following members:

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FCMAT Intervention Specialist

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Paso Robles Unified School District

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Retired, Director of Transportation

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

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

Executive Summary

To serve its students' needs, the Armona Union Elementary School District has a unique model of maintenance, operations and transportation (MOT) service delivery that requires nearly all MOT staff members to possess and maintain a bus driver license. Rather than look outside for substitute bus drivers, the district can quickly cover driving needs internally, though sometimes to the detriment of other operational areas such as maintenance, grounds or custodial functions.

The district has several modernization and new construction projects underway or being planned, including the recent addition of a multipurpose room and four new kindergarten classrooms under construction on its elementary school campus. As the district adds square footage, it should analyze the impact this has on its MOT program staffing.

Based on the data available, MOT staffing should be increased to properly maintain district facilities, especially in the maintenance and custodial departments. However, to better understand MOT staffing needs, the district needs to implement a work order system or other formal procedure to track and monitor work order requests, response times, and other nondepartmental activities. Operational inefficiencies and a lack of planning further limit the department's ability to operate effectively. Comprehensive preventive maintenance, deferred maintenance, and tree and turf care plans need to be developed and implemented to maintain school facilities at the high level the district and community expect.

For general education and certain special education transportation, the district operates four bus routes daily except Wednesdays and other minimum days, when it operates five. As of the current year, the district depends on MOT staff whose primary duties do not include daily bus driving, including the supervisor, to cover regular routes and work as substitute school bus drivers when needed. The district should consider adding at least one full-time custodian/bus driver position to relieve the MOT supervisor of daily driving, return one afternoon custodian to operational duties only, and provide an additional substitute to fill vacancies caused by employee leaves and absences.

The district's MOT Department model is appropriate for its size; however, it would benefit from the addition of a lead custodian position to improve the level of cleanliness by providing additional oversight and standardization in areas such as cleaning standards, scheduling and training.

The department lacks written policies and procedures manuals, which are needed to clearly define expectations and serve as a resource for staff and administrators. Standard and routine training is also lacking and needs to be developed in conjunction with policies and procedures. This training should be relevant to accomplishing the tasks associated with employees' positions. Mandated safety training is also needed to help reduce risk.

Findings and Recommendations

Organizational Structure and Staffing

Organizational structure establishes the framework an institution, such as a school district, uses to define leadership roles and delegate specific duties and responsibilities to all staff members. It is normal and best practice for district leaders to manage this structure to maximize resources and achieve identified goals, and to adapt it as needed as a district's enrollment increases or declines.

A district should be staffed and structured according to generally accepted theories of organizational structure and the standards used in public school agencies of comparable size and type. As discussed in *Principles of School Business Management* by Craig R. Wood, David C. Thompson, and Lawrence O. Picus, the most common of these theories are span of control, chain of command, and line and staff authority.

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 routine duties that are easier to supervise.

Chain of Command

Chain of command refers to the flow of authority in an organization. Chain of command is characterized by two significant principles: unity of command, in which a subordinate is accountable to only one supervisor, thus eliminating the potential for conflicting direction from multiple supervisors; and the scalar principle, in which authority and responsibility should flow in a direct vertical line from top management to the lower levels. The result is a hierarchical division of labor.

Line and Staff Authority

School district organizational structure has both 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, in the Armona Union Elementary School District, the superintendent has direct line authority over the maintenance, operations and transportation (MOT) supervisor, and the MOT supervisor has direct line authority over the bus drivers and maintenance, grounds and custodial staff. In contrast, staff authority is advisory in nature. Staff personnel do not have the authority to make and implement decisions, but act in support of supervisors who have line authority.

The purpose of organizational structure is to help district management make key decisions to facilitate student learning while balancing staffing and financial resources. An effective organizational design will outline the management process and its specific links to the formal system of communication, authority and responsibility needed to achieve a district's goals and objectives. Authority in a public school district originates with the elected governing board, which hires a superintendent to oversee the organization. Through the superintendent, authority and responsibility are delegated to the district's administration and staff.

Management positions are responsible for supervising employees and the work of their respective departments. They must ensure staff members understand all district policies and procedures and perform duties in a timely and accurate manner. A manager also serves as the liaison between their department and others to identify and resolve problems and design and modify processes and procedures as needed. Management positions are typically not responsible for routine daily functions; these activities are best assigned to department staff.

Department Staffing

The MOT Department is managed by the district's MOT supervisor, who has worked in the position for more than 20 years. The supervisor provides line supervision for 8.0 full-time equivalent (FTE) positions including bus drivers and maintenance, grounds and custodial staff. The MOT Department is staffed with experienced workers, almost half of whom have more than 20 years of service; staff have an average employment tenure of more than 17 years in the district, the shortest being five years and the longest 28 years. The MOT supervisor is not responsible for school facilities planning and construction.

As shown in the table below, the district employs three custodians and five combination MOT positions: one maintenance/bus driver, two grounds/bus drivers, and two custodian/bus drivers. At the time of FCMAT's review, the MOT supervisor shared driving responsibility for one bus route with a custodian/bus driver. The other custodian/bus driver serves primarily as a substitute driver to cover employee absences. Of the total 8.0 nonsupervisory FTE in the MOT Department, approximately 1.6 FTE support transportation and 6.4 FTE support maintenance and operations.

MOT Position Title	Total FTE*	Bus Driver FTE	Maintenance and Operations (M&O) FTE	Supervisory FTE
Maintenance/Bus Driver	1.00	0.46	0.54	0.00
Grounds/Bus Driver	2.00	0.93	1.07	0.00
Custodian/Bus Driver**	2.00	0.10	1.90	0.00
Custodian***	2.92	0.00	2.92	0.00
MOT Supervisor****	1.00	0.11	0.00	0.89
Total	8.92	1.60	6.43	0.89

* Total FTE includes both full-time and part-time employees.

** M&O FTE is overstated for custodian/bus driver positions; FCMAT could not accurately quantify hours for custodian/bus driver positions serving when needed as backup drivers.

*** One custodian is an 11-month position; all others are 12-month positions.

**** MOT supervisor spends 55 minutes daily driving one morning bus route; afternoon route is covered by one custodian/bus driver position.

The traditional school day schedule has led to the prevalence of part-time and/or split-shift bus driver positions in district transportation programs. To attract applicants with full-time employment opportunities, districts often supplement bus driver hours with maintenance, grounds or custodial work. In these circumstances, it is best if the supplemental work augments that of full-time maintenance, grounds or custodial staff. Because the district has mostly full-time combination positions in its MOT department, bus driving work takes precedence over maintenance and operations duties; consequently, the maintenance and operations program's effectiveness has suffered.

Job Descriptions

The governing board last approved the MOT supervisor position job description in November 2000. The MOT supervisor position title on the district's organizational chart does not match that on the most recent board-approved job description. In addition, the position's essential duties are not clearly delineated or organized into key areas of authority, function and responsibility (e.g., maintenance, custodial, grounds and transportation).

The district's job descriptions for combined MOT positions, including maintenance/bus driver, grounds/bus driver, and custodian/bus driver, do not clearly delineate the different knowledge, skills, and abilities required for each functional area. It would benefit the district to separate the bus driver position job description from the maintenance and operations position job descriptions.

The district only reviews its job descriptions when filling vacant positions. To ensure consistent and effective performance by the department and its employees, the district needs to review its job descriptions regularly to ensure essential duties are clearly defined for each position. The best practice is to review job descriptions annually and present them to the governing board for approval if changes are needed.

Recommendation

The district should:

1. Review, revise, and update the job descriptions for MOT department positions to ensure the district's current needs and expectations are clearly defined in each functional area — maintenance, operations and transportation.

Maintenance

Maintenance's 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. The primary goal is to reduce and limit failures of building components that affect the district's operations. Maintenance best serves the educational program when the facilities needed to support teaching and learning are safe and functional.

The district's one maintenance worker also drives a bus route daily. This dual responsibility has resulted in a lack of practical experience and journeyman-level training in any one specific trade. In addition, because of its limited focus on in-house maintenance, the department lacks the equipment and tools to perform routine work and repairs throughout the district.

A 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
- Roofing
- Locksmithing
- Painting

Maintenance Staffing

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

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

Using the APPA formula and district-provided data for total facility square footage (sf), the following table shows the number of FTE maintenance positions the district would need for each level of service if all routine maintenance tasks were performed in-house:

Level of Service (based on 76,156 sf)*	No. of FTE
Level 1 — Showpiece Facility	1.6
Level 2 — Comprehensive Stewardship	1.1
Level 3 — Managed Care	0.8
Level 4 — Reactive Management	0.6
Level 5 — Crisis Response	0.3

*Does not include square footage for new construction of four kindergarten classrooms (estimated total of 6,255 sf) on the elementary school campus; added square footage would increase the APPA formula FTEs by approximately 0.1 for each level.

The department has approximately 0.54 FTE maintenance positions. Therefore, based on the APPA calculation, the district's in-house level of service is between crisis response and reactive management. Staff interviews and FCMAT's site visits confirmed a current level of service between levels 4 and 5. A facility with this level of service has maintenance activities that appear chaotic and without direction. Equipment and building components are routinely broken and inoperative. Service and maintenance calls are never responded to in a timely manner. Normal use and deterioration continue unabated, making buildings and equipment inadequate.

District staff reported that the maintenance worker spends time on nonmaintenance activities other than bus driving. FCMAT could not quantify time spent on nonmaintenance activities because the district does not maintain a work order system to track maintenance requests. Accurate information on the time spent on nonmaintenance activities may indicate a need to further increase maintenance staffing or redistribute duties to other operational functions.

The district also reports that it does not outsource for preventive or ongoing maintenance work, except for HVAC maintenance. When considering how to increase maintenance staffing, the district will need to study the financial efficiency of insourcing versus outsourcing work that requires licensed staff, and consider the effect outsourcing will have on in-house staffing.

Unless the district invests more in maintenance, the condition of facilities will decline. In the long term, the practical consequence of understaffing maintenance is the neglect of critical preventive maintenance work because of the prioritization of immediate repair work. When buildings and building systems do not perform as anticipated, it can lead to failure of building components and systems or loss of intended use. These problems may reduce the functional performance of the building, cause damage to its features, or create hazardous conditions that could lead to structural failures, unhealthy environments, and increased costs.

Increased maintenance staffing levels will ensure the district achieves a comprehensive stewardship level of maintenance. The district's small size restricts its ability to hire for all trades listed above; however, an additional 1.0 FTE position in one specific trade could allow the district to focus on building diagnostics. In addition to trade work, a dedicated in-house position could diagnose building and system problems and determine when to outsource based on the work's complexity and specialization. This position could serve as the district's point person to coordinate outside vendor work and be accountable for planning, coordination and execution of its overall maintenance program.

Work Order System

The MOT Department does not have a work order system; rather, the MOT supervisor and maintenance worker receive work requests from district staff via email, phone calls, text messages or in person.

During interviews, district staff indicated that the current process does not meet the district's needs. Specifically, the district is unable to determine the total number of work requests in a given year, track the cost of repairs by request and trade, or monitor outstanding requests and the amount of time needed to complete maintenance activities. Without this information, the district cannot accurately determine the staffing needed to reach the APPA recommended level.

When appropriately used, a work order system can provide accountability for staff, track requests for users, and supply important data for budget and maintenance planning.

Online work order systems are available at reasonable cost for small school districts. At a minimum, the district needs to establish a dedicated email address and procedure (such as a Google work order request form) to provide improved information tracking and sharing, along with written policies and procedures to ensure the following information is readily available to communicate to requestors and district leadership: number of work order requests, work progress, timelines, costs, and completion dates.

The information maintained in a work order system is essential to support the department's overall credibility within the district. The MOT supervisor needs to develop a method to routinely audit the turnaround time and completion rates of work orders, ensure outstanding requests are tracked and addressed in a timely manner, and create a written procedure documenting the level of detail recorded in the district's system.

Preventive Maintenance Planning

The district does not have a formal preventive maintenance plan. A preventive maintenance 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 should include the monthly, quarterly, semiannual, seasonal, and yearly tasks needed to proactively maintain it. The plan should also 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, which is not uncommon in a small district. As noted previously, the department is insufficiently staffed and operates in a reactionary mode. Although this hands-off approach keeps maintenance costs low in the short term, it will prove more costly in the long run. Equipment that fails without warning creates a need for immediate repair at higher cost. In addition, equipment failures during critical times often result in unnecessary costs for mitigation or workaround solutions, and could create an uncomfortable, inoperable, or unsafe environment for students and staff.

A comprehensive preventive maintenance plan can prevent emergency response situations, increase facility function, lower operating costs, improve safety and customer satisfaction, and aid in budget planning. The district needs to develop and implement a preventive maintenance plan. At a minimum, the MOT supervisor needs to develop an annual calendar and written procedures to manage the district's preventive maintenance priorities throughout the year, in accordance with available funding sources. As noted in the previous section, the district does not use a work order system. If such a system was in place, it could also track and automate preventive maintenance work orders based on the schedule in the district's plan.

Deferred Maintenance Plan

The district has set aside funds for deferred maintenance but still needs to develop, or solicit the development of, a comprehensive deferred maintenance plan. Effective deferred maintenance plans contain at least the following components:

- List of all facilities
- List of all building systems for each facility (this list will mirror the building systems list noted above and be used in the preventive maintenance plan)
- Original construction or reconstruction date of the building system
- Typical life expectancy of the building system
- Current condition of the building system
- Restoration or replacement tasks needed to ensure the facility functions as designed, and a timeline of when they need to be performed.

Because the district is small, it should expect to contract all or most deferred maintenance work. Many small districts have implemented the California Uniform Public Construction Cost Accounting Act's informal and formal bidding requirements to complete deferred maintenance projects, which typically involve a long-term planning perspective. Responsibility for these projects often resides with the district administrator who oversees the management of facilities, construction and planning, and who has experience navigating bidding laws and overseeing large construction-related contracts. In contrast, the MOT department focuses on day-to-day and annual operational functions, such as routine maintenance, repairs, and cleaning.

The district's superintendent and chief business official (CBO) oversee the district's construction projects and public works bidding process. The superintendent, CBO and MOT supervisor will need to work collaboratively to develop a deferred maintenance plan; such a plan should include the district's new construction and modernization projects. Recently, the district completed construction of a multipurpose room and has nearly completed the addition of four kindergarten classrooms on the elementary school campus. Developing, implementing, and maintaining an up-to-date deferred maintenance plan will help the district maximize the life of these capital assets. As it completes additional modernization projects, the district will need to update its deferred maintenance plan accordingly.

Purchasing and Parts Inventory

The use of standing purchase orders (POs) is a widespread practice in districts to help procure specific items from a vendor for a predetermined period (typically a fiscal year). To eliminate the processing of numerous small purchase orders, the district's Board Policy 3300 authorizes the superintendent or superintendent's designee to create standing POs as needed, provided the PO details a maximum purchase amount, the types of items that can be purchased, the individuals authorized to approve purchases, and the PO expiration date.

In interviews, district staff reported that the district had eliminated the use of standing maintenance POs except for Home Depot purchases and replaced it with a process that requires preapproval and two to three quotes for all purchases, regardless of cost. In light of the department's staffing shortage and resulting reactive maintenance environment, this procurement process appears overly cumbersome and likely to slow the department's activities further.

Raising the threshold for maintenance-related quote requirements to a more workable amount, such as \$5,000, and reinstating standing POs in reasonable increments, would improve the department's overall efficiency. Reviewing standing POs and monitoring purchasing patterns regularly can eliminate favoritism to vendors without delaying or hindering needed repairs.

FCMAT observed an extremely limited inventory of parts during a visit to the MOT Department. In interviews, MOT Department staff reported traveling to and from local stores often to acquire the materials and parts needed for repairs. Because the district does not track the time workers spend on maintenance activities by work order request or function, FCMAT could not accurately determine the effect this travel has on the department's overall productivity.

Maintaining an inventory of maintenance-related repair parts may seem to be an effective way to save money, but the potential for theft and risk of obsolescence of or damage to supplies often outweigh the savings from bulk purchases.

The district would benefit from identifying and purchasing in bulk those materials and parts that offer the greatest savings and impact when serving its sites. For other supplies, the district could use drop shipments, in which vendors deliver materials directly to the location in need. These shipments can be more expensive than individual items, but the convenience and availability of goods is greater. A standing PO at a local hardware store would also allow maintenance staff to purchase parts directly when needed. All these purchasing options ensure the maintenance program has sufficient materials and supplies to perform as efficiently as possible in support of the district's operations.

Recommendations

The district should:

1. Consider increasing maintenance staffing by 1.0 FTE to achieve a comprehensive stewardship level of service.
2. Ensure in-house maintenance staff have the equipment and tools needed to perform day-to-day work.
3. Study the financial efficiency of insourcing versus outsourcing maintenance work that requires licensed staff, and develop policies and procedures to guide outsourcing.
4. Investigate options for and implement a cost-effective method, such as an online work order system or formal internal procedure, to organize, monitor and measure all maintenance staff work, including nonmaintenance activities.
5. Create and implement a comprehensive preventive maintenance plan; once it is implemented, use the work order system to manage preventive maintenance work.
6. Develop a comprehensive deferred maintenance plan, and update it as often as needed.
7. Develop a department procedure for procuring materials and supplies, including a reasonable quote requirement and the use of standing POs when appropriate.

Grounds

Success in grounds management depends on well-trained personnel with skills in a variety of areas, including maintenance of lawns, athletic and play fields, trees, and landscaping. 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 for a grounds department include the following:

- School sizes in acreage
- Number and types of outdoor spaces maintained
- Type and extent of natural and hardscape features
- Extent to which grounds crews perform unrelated tasks

The district's grounds staff are responsible for maintaining the three district school sites (Armona Elementary School, Parkview Middle School, and Crossroads Charter Academy) and the Armona Community Center, which includes the district office and the Armona Library as well as a neighboring park and two recreational softball/baseball fields.

Grounds Staffing

The grounds department consists of two full-time grounds/bus driver positions filled by experienced employees who have worked in the district for approximately 15 and 25 years, respectively. District-provided work schedules showed the employees each spend 4.25 hours per day performing grounds work, or the equivalent of approximately 1.07 FTE positions total; the remainder of the workday is scheduled for bus driver responsibilities. This FTE position count does not take into account the additional time grounds staff spend on nongrounds duties. District staff reported spending time on nongrounds activities such as helping with maintenance, assembling furniture, delivering packages, picking up trash, and cleaning the park's restrooms. Although the district tracks hours staff spend driving regular bus routes, it does not monitor the time grounds workers spend on other nongrounds assignments.

The district contracts with a local landscaping company for grounds services. Starting in 2013, the district entered into a month-to-month agreement with an external vendor for \$3,559 per month, or \$42,708 annually, for weekly services including the following at all district locations except the Crossroads Charter Academy: field mowing, shrub and bush trimming, weed whacking, and leaf blowing. FCMAT did not have enough information to calculate the FTE equivalent associated with the contracted work. The study team visited all schools during fieldwork and, based on a cursory review, the grounds contract appears sufficient to manage the district's basic mowing and landscaping needs.

The external contractor also manages the control of all irrigation timers, adjusting them seasonally; however, they do not repair damaged sprinklers, valves, or main and lateral lines. District staff reported that the department's response to irrigation repairs is slow. FCMAT observed at least one irrigation leak requiring repair while touring the middle school campus. As discussed throughout this report, the combination MOT positions prioritize bus driving responsibilities at the expense of maintenance and operations duties. The district needs to evaluate the time grounds staff spend on irrigation repairs and analyze the costs and benefits of expanding the external contractor's scope of services to include such work, or adjust its grounds FTE positions accordingly.

Turf and Tree Care Plans

A turf care plan ensures that a district's turf areas continue to meet its needs and the community's expectations. The district does not have a turf care plan. A well-developed turf care plan should include the following components: turf area, grass species, intended use (e.g., light athletics, heavy athletics, ornamental only), 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, and usage limitations. The MOT supervisor needs to develop and implement such a plan, with the help of the external vendor, to ensure the district's properties best support its operational needs.

The contracted summary of services with the external vendor does not include tree trimming and gopher abatement but does include herbicidal spraying. District staff reported having responsibility for tree trimming, particularly at the neighboring park, and for gopher abatement; however, the district does not have a tree care plan. A comprehensive tree care plan catalogs and maps the locations of all trees taller than six feet or greater than 1.5 inches in trunk diameter at chest height. The plan will also document and make recommendations (if any) on the following needs for each tree species: irrigation, pest control, fertilization, frequency of inspection, frequency and types of trimming work, and potential safety concerns. For any trees with size, age, or other conditions that indicate a safety risk, a certificated arborist is needed to complete a tree risk assessment. The district would benefit from making its MOT supervisor responsible for developing and maintaining such a plan. Having a tree care plan improves safety and aesthetics, and facilitates budget planning.

Recommendations

The district should:

1. Track the amount of time grounds staff spend on nongrounds duties, and reassign duties or adjust its grounds staffing allocation when appropriate.
2. Consider expanding the scope of services with external vendors to reduce delays in irrigation repairs.
3. Develop and implement a comprehensive turf care plan.
4. Develop and implement a tree care plan.
5. Hire an arborist to complete a tree risk assessment for any trees for which size, age, or condition indicates a potential safety hazard.

Custodial

The custodial department is dedicated to ensuring facilities are clean for student and staff use. The district assigns custodians to work at specific district sites, including the three district schools (Armona Elementary School, Parkview Middle, School, and Crossroads Charter Academy), and the district office and Armona Library, which are located in the Armona Community Center.

Two of the five custodian positions also drive a daily bus route, and one custodian position is also a substitute bus driver. Bus driver responsibilities reduce both the time spent on and the efficiency of custodial work. The district also has one full-time custodian position that has an 11-month work year; all other custodians are 12-month positions. In interviews, district staff could not explain the rationale for this difference in work year.

Using district-provided work hours, FCMAT estimates the district has the equivalent of approximately 4.82 FTE positions assigned to custodial duties, not adjusting for any time spent on substitute driving or other noncustodial activities.

Custodial Staffing

The California Association of School Business Officials (CASBO) has established a staffing formula that is generally accepted as a standard for estimating custodial staffing needs in school districts throughout California. This formula uses square footage and the number of students, teachers, classrooms, offices, and general-purpose areas. The CASBO formula is as follows:

- One custodian for every 13 teachers
- One custodian for every 325 students
- One custodian for every 13 classrooms
- One custodian for every 18,000 square feet
- A factor for community use based on the type of school
- A factor for schools with enrollment of less than 450 students

The sum of the above is then divided by four to indicate the number of custodians needed to clean a building or buildings. FCMAT reviewed and compared a district-provided calculation to that of the CASBO standard. This data is as follows:

	FTE
District custodians (employees with scheduled cleaning tasks)	4.81
CASBO standard recommends	5.25

This calculation indicates the district’s custodial department is understaffed compared to CASBO’s calculation by at least 0.44 FTE. However, the district’s actual custodian FTE is lower than 4.81 FTE because of substitute driving hours (which could not be quantified for this analysis) and other operational inefficiencies associated with the combined MOT positions splitting daily work between the transportation and custodial departments. As with the other maintenance and operations positions previously discussed, student transportation takes precedence over custodial cleaning assignments, and often results in inconsistent levels of cleaning and gaps in custodial coverage. This challenge is compounded by the district’s limited pool of

substitute custodians. Consequently, the district would benefit from increasing custodial staffing levels to higher than the CASBO standard.

Organization and Leadership

The custodial department's organizational structure is centralized with all custodians reporting to the MOT supervisor, who conducts their annual performance evaluations. During FCMAT's fieldwork, school administrators reported that they are not involved in custodial evaluations and that the district did not have clear expectations or documented cleaning standards by which to measure performance. School administrators expressed concerns with the level of cleanliness maintained. Although academic professionals are focused primarily on student instruction, their input should be considered when evaluating the work performance of custodians who serve their campuses.

The district would benefit from implementing a hybrid supervision model, in which the MOT supervisor and the school administrator coordinate with one another to produce an evaluation. Under this model, the MOT supervisor typically evaluates an employee's technical skills, such as cleaning methods, vacuuming, dusting, mopping, stain removal, glass cleaning, sink cleaning, and efficient use of time; the school administrator evaluates the employee's soft skills, such as attendance, dependability, work attitude, and interactions with staff, students and community. Using this model would increase both the standard of care and accountability in the custodial department.

Based on the department's current staffing level and organizational structure, the district would also benefit from adding a lead custodian position that reports to the MOT supervisor and provides another level of program oversight. This position would be custodial only and would be responsible for overseeing the department's cleaning standards, scheduling and training, and for ensuring staffing gaps are communicated to custodial line staff to ensure proper coverage when needed. This position would also be responsible for standardizing and coordinating materials and supply orders with vendors and for distribution and use by custodial staff.

Cleaning Standards

To develop meaningful standards, planners, administrators and community members need to agree on what constitutes an acceptable level of cleanliness. Although there are no nationwide standards of cleanliness, the U.S. Department of Education has established five levels of cleaning, including the number of square feet that a custodian working an eight-hour shift can reasonably expect to clean at each level:

- Level 1 cleaning results in a spotless and germ-free facility as might normally be found in a hospital or corporate suite. A custodian with proper supplies and tools can clean approximately 10,000 to 11,000 square feet in eight hours at this level.
- Level 2 cleaning is the uppermost standard for most school cleaning and is usually reserved for restrooms, special education areas, kindergarten areas, and food service areas. This service level includes vacuuming or mopping floors daily, and sanitizing all surfaces. A custodian can clean approximately 18,000 to 20,000 square feet in an eight-hour shift at this level.
- Level 3 cleaning is the norm for most school facilities. It is acceptable to most interested parties and does not pose any health issues. Classrooms are cleaned daily, which includes dumping trash and cleaning shared area surfaces such as sinks and door handles. Carpets

are vacuumed and surfaces used by students are sanitized every other day. A custodian can clean approximately 28,000 to 31,000 square feet in eight hours at this level.

- Level 4 cleaning is not normally acceptable in a school environment. Classrooms are cleaned every other day, carpets are vacuumed every third day, and dusting is done once a month. A custodian can clean 45,000 to 50,000 square feet in eight hours at this level.
- Level 5 cleaning can very rapidly lead to an unhealthy situation. Trash cans may be emptied, and carpets may be vacuumed only weekly. One custodian can clean 85,000 to 90,000 square feet in eight hours at this level.

Although the figures above are estimates, they are an excellent starting point for establishing standard schedules. The actual number of square feet per shift a custodian can clean will also depend on variables such as the types of facilities, school activity schedules, flooring, wall coverings, number of windows, restroom layouts, gym and athletic facilities, and offices.

Based on FCMAT's review of facilities and information collected in staff interviews, the district's facility cleanliness is at a level between 4 and 5, which is below the level 2 or 3 standards expected for schools. This lack of cleanliness is mainly the result of noncustodial duties infringing on cleaning time, departmental inefficiencies, and undefined and inconsistent cleaning expectations and standards.

Written operating procedures are useful for establishing expectations and standards to define a department's work and measure its success. It is best practice to ensure cleaning standards include daily, weekly, monthly and annual activities, and that they be in place before detailed work schedules are created to ensure adequate time and staffing are available to complete all required tasks. Although some of the district's custodial staff members have been employed in the district for more than 10 years and have a considerable amount of historical knowledge, this institutional experience has not translated into formal policies and procedures, which increases the department's inefficiencies because it relies solely on employees' knowledge.

FCMAT found no documented work schedules for individual custodians during fieldwork. In interviews, department staff stated that custodians develop their own daily work schedules, with minor input from principals and the MOT supervisor. These schedules need to be developed in coordination with school and district administrators, provided to employees in writing, and used to evaluate employees' performance. Because the department is often short-staffed due to the lack of substitutes and the transportation program's needs, the district could better address custodial coverage gaps by developing and using an essential daily task schedule for each custodial position. This task list will reflect the minimum activities required to prepare schools for the next day.

School districts often document custodial standard operating procedures in a custodial handbook. Such a resource serves as a reference and guide for both permanent and substitute custodians to standardize work and provide for consistency in service across district sites. The district does not have a custodial handbook. In interviews, staff responses regarding cleaning times, procedures, priorities, and materials and supplies were varied and loosely connected to industry standards. When questioned about the amount of time allocated to cleaning classrooms, answers varied widely, revealing an overall lack of direction and standardization. Without written policies and procedures to standardize the department's work, the district cannot maintain a uniform expectation and standard level of cleanliness. In addition, the lack of procedures creates inefficiencies, especially when new employees are hired and when substitute employees are used. These two groups of employees are frequently left to learn their responsibilities with little or no formal training.

The district would benefit from making the MOT supervisor, or a lead custodian under the direction of the MOT supervisor, responsible for developing and maintaining standard operating procedures for the custodial department, and for documenting that written guidance into a district custodial handbook, including a product list for material and supply purchases. Once written standards, work schedules, and processes and procedures are in place, the department's leaders will need to hold custodial staff accountable for performance through regular written feedback, including the use of a cleaning inspection checklist.

Facility Rentals

The district has policies and procedures to allow community use of its facilities, including the Armona Community Center, Armona Elementary School multipurpose room and fields, and Parkview Middle School field. The district charges a minimal fee based on facility type; however, its facilities rental fee schedule does not match the language regarding available facilities in its rules and regulations documents.

The district's Facilities Rental Rules and Regulations document indicates certain rentals may include the use of restrooms, and renters are responsible for all set up, take down, and cleaning after use. In interviews, district staff reported that facilities, particularly restrooms, are often not adequately cleaned and prepared for district use after community rentals.

The district collects a \$200 refundable fee when keys are checked out, as well as a deposit fee when a reservation is approved. These fees are refundable if there is no damage or loss to the facility. The district needs to ensure all facilities are inspected, cleaned and prepared to the district's standard level of service before returning refundable fees.

The district would benefit from assigning its own MOT staff to cover facility needs during community use. In interviews, MOT staff reported working little or no overtime. Any evening or weekend coverage by full-time district employees will result in overtime compensation.

Recommendations

The district should:

1. Increase its 11-month custodial position to a 12-month work year to increase custodial staffing FTE.
2. Consider implementing a hybrid supervision model by including school administrators in the annual performance evaluation for custodians who work on their campuses.
3. Consider adding a lead custodian position to further increase custodial staffing FTE and to improve the district's level of cleanliness by providing additional oversight of cleaning standards, scheduling and training.
4. Establish cleaning expectations and standards; train staff on the standards and hold staff accountable for meeting them.
5. Develop and implement custodial work schedules based on available staffing and the district's cleaning standards; analyze, update and reallocate custodial assignments to ensure even work distribution in new schedules.
6. Develop and implement written standard operating procedures in a custodial handbook to standardize cleaning districtwide and to document the district's standards for service and cleanliness.

7. Develop and use a cleaning inspection checklist.
8. Solicit input from custodial line staff and management to collaboratively develop, use and maintain a product list for material and supply purchases.
9. Analyze the facilities fee schedule and deposit structure to ensure it covers all district costs associated with community use. Reconcile and update rental agreement language to match the fee schedule.
10. Ensure all facilities are inspected, cleaned and prepared to the district's standard level of service after community use.
11. Use district staff to clean facilities during and after community use; establish policies and procedures regarding the assignment and approval of necessary custodial overtime.

Maintenance and Operations Safety and Training

The district lacks a formal training program for maintenance and operations staff. In interviews, department staff indicated having received little or no regular training, other than annual mandatory training, over the past several years. The MOT supervisor is responsible for ensuring that current, new and substitute employees receive initial and ongoing training relevant to their positions. Even with an experienced workforce, the district needs to ensure its personnel are adequately and regularly trained on safety and industry-specific best practices.

An effective formal training program will include training on the following topics: anti-microbial safety, bloodborne pathogens, material safety data sheets, injury and illness prevention program, respiratory protection, hand and power tool safety, back injury prevention, safe work practices, hazard communication plans, ladder safety, electrical safety, driver safety, and specific safety procedures for each specialty trade performed by district staff.

The district did not provide any training records for review. Based on interviews, maintenance and operations staff have not completed essential trainings for asbestos management and lead paint disturbance, and the district could not provide asbestos management plans upon request. The Environmental Protection Agency (EPA) requires that school districts comply with the Asbestos Hazard Emergency Response Act (AHERA), appoint a designated person for asbestos-related activities, and implement a plan for managing asbestos-containing building materials in school buildings and complying with federal asbestos regulations. The district needs to provide maintenance and operations staff with this training and designate a position, such as the MOT supervisor, to be responsible for compliance with AHERA and all local air board regulations.

The EPA requires employees who perform renovation, repair or painting in pre-1978 child-occupied facilities to be lead-safe certified. This rule also applies to any firms the district hires to perform this type of work. The district needs to ensure it complies with the EPA's lead renovation, repair and painting rule.

The MOT supervisor is responsible for developing a thorough, standardized and routine training program to ensure the department complies with federal, state and local safety regulations. The supervisor is also responsible for scheduling such training to ensure it occurs at convenient times to support the department's work. The district needs to designate one employee to maintain all employee records related to mandated safety and health training to ensure coordination and compliance. In addition, regular safety meetings for all maintenance and operations staff would help improve communication, promote education, and resolve issues as they arise.

A meaningful professional development program is beneficial not only for improving staff technical knowledge and skills but also for maintaining and boosting staff morale, because it demonstrates the district's interest in investing in its employees and their welfare. The MOT supervisor will need to tailor annual special training on topics in each of the department's functional areas (i.e., maintenance, grounds, and custodial), as well as provide for routine meetings that include discussions pertaining to industry standards and best practices to increase the department's overall efficiency.

Recommendations

The district should:

1. Develop a regular training program to provide mandatory safety and specialty training for current, new and substitute employees.

2. Evaluate its needs and staff members' skills and knowledge regularly to identify areas in which training is most needed; provide specialized training in these areas.
3. Designate a position, such as the MOT supervisor, to be responsible for compliance with AHERA, EPA, and all local air board rules and regulations.
4. Maintain complete records of training to ensure that all employees are trained and to improve employee accountability.
5. Ensure that regular safety meetings for all maintenance and operations staff are held and documented.

Transportation

The district's transportation program is organized into its larger MOT Department. This is appropriate for a small district such as Armona. The district operates four bus routes most school days, five on Wednesdays and other minimum days, and serves approximately 300 students; it has few extracurricular and co-curricular activity trips throughout the year. The Kings County Office of Education transports all special education students who require transportation to out-of-district special education programs. The district covers approximately 40 square miles of flat and mostly rural terrain.

Transportation Staffing

The district employs six staff, including the MOT supervisor, who have commercial driver's licenses and special certificates to operate a school bus. As previously noted, the department has five combination maintenance and operations/bus driver positions: one maintenance/bus driver, two grounds/bus drivers, and two custodian/bus drivers. Four of the positions serve as regular daily drivers, and one custodian/bus driver position serves mainly as a substitute with a regular afternoon route on Wednesdays or other minimum days. In the past, the district had two additional bus drivers with custodial duties. The district downgraded these to full-time custodial positions when the employees relinquished driving certificates for medical reasons.

The district's transportation program webpage shows only three daily bus routes. However, additional documents and staff interviews indicated that the district added a fourth route after the start of the 2022-23 school year to serve students living in a housing subdivision in north Armona. The additional route has required the MOT supervisor to drive in the mornings and one custodian to drive in the afternoons. FCMAT reviewed a sample of driver vehicle inspection reports and found a fifth route operating on Wednesday afternoons. District staff reported splitting one afternoon route to accommodate the early release of all students on Wednesdays and on other minimum days.

Based on provided work schedules, FCMAT estimates the department has the equivalent of 1.6 FTE bus driver positions, with most drivers spending around two to three hours on transportation activities daily, including pre- and post-trip inspections, driving, interior and exterior cleaning, and communication about vehicle maintenance and service needs. When a driver is absent, the substitute driver is pulled from regular custodial duties and is therefore often unable to complete the assigned daily cleaning tasks.

From a pupil transportation perspective, the combination MOT position works well because it ensures the district maintains sufficient transportation staffing during what is currently recognized as a national crisis in school bus driver recruitment and retention. However, based on current routing requirements, the district would benefit from adding at least one full-time custodian/bus driver position to relieve the MOT supervisor of daily driving, return the afternoon custodian to operational duties, and provide an additional substitute to fill vacancies caused by employee leaves and absences.

Routing Method and Efficiency

The district's pupil transportation fleet is composed of five large chassis transit design school buses that carry 76, 78 or 82 passengers. The department does not use a computerized routing system, and routes are fixed, with few changes throughout the year. The four main routes are regional, serving both suburban and rural areas, and cannot be easily consolidated to increase operational efficiencies. In rural areas, routes are longer and include stops at individual ranch homes; bus stops change as students transition in and out of the program.

Assigning students to bus routes and documenting this information is essential to ensure student safety and support operational planning. Education Code Section 39831.3 requires school districts providing student transportation to prepare a transportation safety plan containing procedures for school personnel to follow to ensure the safe transport of pupils; such as a plan should include the identification of all students accessing transportation. The MOT supervisor needs to be responsible for this function, and the information should be readily available to district and school administrators. The district does not formally document students by bus route, which has led to confusion at schools when students are released at the end of a school day. For example, in the current year district staff reported losing a student for a brief time when the pupil exited at an incorrect stop. Because the district is small, an electronic routing system may not be a cost-effective solution; however, at a minimum, a Google or Excel spreadsheet needs to be developed and shared with schools, or the district could use its student information system to track student transportation data and services.

District staff also reported logistical challenges in managing bus loading on Wednesday afternoons and other minimum days, when all grade levels release at the same time at both the elementary and middle schools. To accommodate the condensed schedule, the district recently split one route into two in the afternoon on Wednesdays and other minimum days. The district could eliminate this additional route by revising its master bell schedule to allow for a separation between release times on minimum days.

FCMAT did not validate the number of extracurricular and co-curricular activity trips the transportation department completes annually. However, district staff reported providing bus transportation for a limited number of field trips during the school day, with few scheduled for evenings and weekends. Because midday trips pull bus drivers away from other regular maintenance and operations assignments, the district would benefit from tracking the hours associated with these activities to accurately determine their impact on the district's overall MOT department responsibilities.

Many school districts use two-way radio systems as a primary communications solution for school safety in general and transportation in particular. In interviews, district staff shared that cell phones are the primary communication method used for the transportation program. As cell phones cannot be used while driving, drivers must pull over and stop on the side of the road whenever needed to make and receive phone calls. Two-way radios would provide greater utility and flexibility than cell phones and could be used safely while in motion to facilitate contact between drivers, dispatchers and district administrators.

Bus Driver Training and Safety

Education Code Sections 40080 through 40089 establish the requirements for school bus driver training in California. Drivers must initially receive a minimum of 20 hours of classroom training and 20 hours of behind-the-wheel training on content developed by the California Department of Education's Office of School Transportation. Drivers must then complete a minimum of 10 hours of in-service training each year. Most trainers teach for a minimum of 35 hours in the classroom and spend at least that many hours behind the wheel. All training must be performed by a state-certified school bus driver instructor. The district contracts with either the local high school district or another agency when needed, because it does not employ a state-certified trainer. Staff interviews indicated that annual in-service hours are usually completed during the summer. FCMAT reviewed driver training records and confirmed the district's compliance with this requirement.

Education Code Section 39831.3 requires school districts to have a transportation safety plan and to maintain a copy of it at each school. Any California Highway Patrol (CHP) officer can request this plan for inspection. The district has such a plan, but it needs to be updated to include language regarding new child check requirements, which require drivers to check the bus after each route or run to ensure no child is

left behind unattended. When requested, the schools could not produce the district's transportation safety plan.

Education Code Section 39831.5 requires school districts to conduct school bus safety instruction and evacuation drills annually for students in certain grades who ride the bus. A district must also keep records of the drills. In addition, specific safety information must be announced before every field trip. In interviews, staff indicated that district staff are aware of these requirements; however, the district could provide evidence only to show it conducted evacuation drills in September 2021.

Vehicle Maintenance

The CHP Motor Carrier Inspector Unit annually inspects buses, vehicle maintenance records, driver records, driver timekeeping records, and federal drug and alcohol testing records. It produces a report of findings entitled the Safety Compliance Report/Terminal Record Update, more commonly known as the "terminal grade." The report also includes the grades for the three previous annual inspections. The results for the district's most recent inspections are "satisfactory," which is the highest grade awarded to any motor carrier and indicates general compliance with laws and regulations governing school bus safety. In the case of an unsatisfactory grade, the CHP advises that a failure to correct the deficiencies can result in a recommendation to the Public Utilities Commission to revoke a district's motor carrier operating authority.

School buses are required to be inspected every 45 days or 3,000 miles, whichever occurs first, in accordance with Title 13 of the California Code of Regulations, Section 1232. The district does not have an internal vehicle maintenance program; it uses external vendors for all preventive bus maintenance inspections, safety checks and repairs, as well as service for its other vehicles. FCMAT inspected vehicle maintenance records, and the district complies with these regulations.

In interviews, transportation staff indicated that repair or service requests are sometimes reported to the external mechanic or the MOT supervisor via phone or in person. The district has no formal system to document, track and monitor the progress of transportation-related repairs. Vehicle repair requests need to be documented on a driver's pretrip form and in a work order system to ensure issues are addressed appropriately and in a timely manner, and this information needs to be recorded for future reference in case of a related safety concern. Drivers also need to receive written confirmation when repairs are completed and when a vehicle can be returned to operation. The district would benefit from developing and implementing a formal standard operating procedure to document its vehicle repair process. This would improve on and supplement the program's current safety measures.

Fleet Cleanliness

District drivers are responsible for cleaning both the exterior and interior of their assigned school buses. As described by district staff, drivers are expected to sweep and dust buses daily during the post-trip period and wash buses as often as necessary. The department does not have standard operating procedures for bus cleaning that address both the interior and exterior surfaces. School buses need to be cleaned thoroughly and disinfected to prevent the spread of harmful pathogens and bacteria. At a minimum, the MOT supervisor needs to verify that all buses are swept, dusted and have trash removed daily to ensure the ride is safe and comfortable for the district's students.

Upon inspection, FCMAT noted that exterior cleanliness was acceptable by appearance, but buses had not been swept or dusted for several days or longer. FCMAT found the overall interiors in unsatisfactory condition, with dirt and dust built up on various ledges and surfaces. As noted previously, the combined nature

of the MOT positions limits the time available for staff to complete transportation-related activities because they are forced to move on to maintenance and operations assignments.

Clean School Bus Grants

The California Air Resources Board implements the state's policies to reduce greenhouse gas emissions, including regulations mandating that 100 percent of in-state sales of new passenger cars and trucks be zero emission by 2035. Like the commercial vehicle industry, school bus manufacturers have long been moving to alternative fuel sources. In addition to reducing greenhouse gases and the community's exposure to harmful diesel emissions, clean school buses can provide a quieter ride for students and reduced maintenance and fuel costs.

To bring such technologies into public transportation fleets, regional air pollution control districts often partner with local utility companies to provide funding to support electric vehicle charging and natural gas infrastructure development. Federal, state and local clean school bus grants are readily available for vehicles that reduce carbon emissions by operating entirely or in part on alternative fuel.

District staff reported that it has yet to analyze operating a clean school bus program or to participate in any grant opportunity to replace its school bus fleet with alternative fuel vehicles. The district's MOT Department and bus yard are located on the elementary school campus. With the new construction and modernization projects under way on that site, the district would benefit from an analysis to evaluate the costs and benefits of implementing a clean school bus program before applying for any related funding opportunities. The regional air pollution control district has [resources available](#) to help the district determine available grant opportunities or other funding sources if the district pursues such a program.

Home-to-School Transportation Reimbursement Funding (Effective 2022-23)

Transportation funding has remained unchanged with no provision for annual cost-of-living adjustments since the Local Control Funding Formula's (LCFF's) implementation in 2013-14. As an add-on to the LCFF apportionment, transportation revenue is restricted to transportation use only, and is subject to a maintenance of effort requirement that districts spend as much as they receive. The district receives \$102,102 in home-to-school transportation add-on funding, and, as of its 2022-23 adopted budget, projects to spend more than \$185,730 on the program. Assuming this expenditure level, the district may be eligible for approximately \$10,000 in new reimbursement funding.

The 2022-23 enacted state budget provided for more than \$630 million in additional ongoing funding as reimbursement to school districts based on prior year eligible home-to-school transportation expenditures. This increased funding will increase the district's LCFF add-on to cover up to 60% of total transportation costs, provided it complies with certain requirements. Specifically, the district must develop and the governing board must adopt a transportation services plan on or before April 1, 2023 that describes how the district will offer transportation services to its students and how it will prioritize services for grades TK-6 and low-income students. Education Code Section 39800.1 outlines the plan's required components, including the following:

1. Description of the district's transportation services that are accessible to students with disabilities and homeless youth

2. Description of how unduplicated pupils, or students identified as English learner, socioeconomically disadvantaged, and foster youth, will access available services at no cost

For reporting and funding purposes, the district will need to ensure it tracks transportation expenditures using function 3600 in the state's standardized account code structure. Further requirements for plan development, data reporting, and frequently asked questions are available on the [California Department of Education's website](#).

Recommendations

The district should:

1. Consider adding at least one full-time custodial/bus driver position to the MOT department to eliminate the supervisor's regular driving duties.
2. Update the information on the district's transportation program webpage to include the current bus route schedules, including minimum day schedules.
3. Develop and implement a written standard operating procedure to assign and track students by bus route, and ensure the information is up to date and available to district and school administrators.
4. Analyze and consider implementing a solution to address operational and safety concerns related to the early release of all students at the same time on Wednesdays and other minimum days, such as adjusting the bell schedules to provide greater separation in release times by grade levels.
5. Track and analyze the work hours bus drivers spend on extracurricular and co-curricular activity trips during and after the school day; use this information to help make department staffing adjustments as needed.
6. Consider implementing a two-way radio system to replace cell phones as the primary communication method for drivers.
7. Update its transportation safety plan annually and distribute it to all schools and/or post it on each school's web page.
8. Develop and follow a schedule for annual school bus evacuation drills; conduct evacuation drills for the current school year as soon as possible to ensure compliance with state law.
9. Develop and implement a written standard operating procedure to formalize and document the district's school bus and vehicle repair requests and completions.
10. Develop and implement a written standard operating procedure to direct the interior and exterior cleaning of school buses; at a minimum, ensure bus drivers sweep, dust and remove trash from all buses daily.
11. Analyze the potential costs and benefits of converting some or all the district's school bus fleet to an alternative fuel source; contact the regional air pollution control district for local, state and federal funding opportunities.

12. Review new home-to-school transportation reimbursement requirements, and prepare and adopt a transportation services plan by April 1, 2023 so it can access additional home-to-school transportation program funds.

Appendices

Appendix A: Study Agreement

Appendix B: Sample Custodial Handbook

Appendix C: Sample Training Matrix

Appendix A

Study Agreement



**FISCAL CRISIS & MANAGEMENT ASSISTANCE TEAM
STUDY AGREEMENT
July 29, 2022**

The Fiscal Crisis and Management Assistance Team (FCMAT), hereinafter referred to as the team, and the Armona Union Elementary School District, hereinafter referred to as the district, mutually agree as follows:

1. BASIS OF AGREEMENT

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

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

2. SCOPE OF THE WORK

A. Scope and Objectives of the Study

1. Conduct an organizational and staffing review of the 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 within the MOT department and make recommendations for improved efficiency, if any.
3. Review the operational processes and procedures for the MOT department and make recommendations for improved efficiency, if any.

B. Services and Products to be Provided

1. Orientation Meeting – The team will conduct an orientation session at the district to brief district management and supervisory personnel on the team's procedures and the purpose and schedule of the study.
2. On-site Review – The team will conduct an on-site review at the district office and at school sites if necessary.
3. Exit Meeting – The team will hold an exit meeting at the conclusion of the on-site review to inform the district of significant findings and recommendations to that point.

4. Exit Letter – Approximately 10 days after the exit meeting, the team will issue an exit letter briefly memorializing the topics discussed in the exit meeting.
5. Draft Report – Electronic copies of a preliminary draft report will be delivered to the district’s administration for review and comment.
6. Final Report – Electronic copies of the final report will be delivered to the district’s administration and to the county superintendent following completion of the review. Printed copies are available from FCMAT upon request.
7. Follow-Up Support – If requested by the district within six to 12 months after completion of the study, FCMAT will return to the district at no cost to assess the district’s progress in implementing the recommendations included in the report. Progress in implementing the recommendations will be documented to the district in a FCMAT management letter. FCMAT will work with the district on a mutually convenient time to return for follow-up support that is no sooner than eight months and no later than 18 months after completion of the study.

3. **PROJECT PERSONNEL**

The FCMAT study team may include:

<i>To be determined</i>	<i>FCMAT Staff</i>
<i>To be determined</i>	<i>FCMAT Consultant</i>
<i>To be determined</i>	<i>FCMAT Consultant</i>

4. **PROJECT COSTS**

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

- A. \$800 per day for each staff member while on site, conducting fieldwork at other locations, preparing or presenting reports, or participating in meetings. The cost of independent FCMAT consultants will be billed at their actual daily rate for all work performed.
- B. All out-of-pocket expenses, including travel, meals and lodging.
- C. The district will be invoiced at actual costs, with 50% of the estimated cost due following the completion of the on-site review and the remaining amount due upon the district’s acceptance of the final report.

Based on the elements noted in section 2A, the total not-to-exceed cost of the study will be \$21,100.

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

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

5. RESPONSIBILITIES OF THE DISTRICT

- A. The district will provide office and conference room space during on-site reviews.
- B. The district will provide the following if requested:
 - 1. Policies, regulations and prior reports that address the study scope.
 - 2. Current or proposed organizational charts.
 - 3. Current and two prior years' audit reports.
 - 4. Any documents requested on a supplemental list. Documents requested on the supplemental list should be provided to FCMAT only in electronic format; if only hard copies are available, they should be scanned by the district and sent to FCMAT in electronic format.
 - 5. Documents should be provided in advance of fieldwork; any delay in the receipt of the requested documents may affect the start date and/or completion date of the project. Upon approval of the signed study agreement, access will be provided to FCMAT's online SharePoint document repository, where the district will upload all requested documents.
- C. The district's administration will review a draft copy of the report resulting from the study. Any comments regarding the accuracy of the data presented in the report or the practicability of the recommendations will be reviewed with the team prior to completion of the final report.

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

6. PROJECT SCHEDULE

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

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

7. COMMENCEMENT, TERMINATION AND COMPLETION OF WORK

FCMAT will begin work as soon as it has assembled an available and appropriate study team consisting of FCMAT staff and independent consultants, taking into consideration other jobs FCMAT has previously undertaken and assignments from the state. The team will work expeditiously to complete its work and deliver its report, subject to the cooperation of

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

8. INDEPENDENT CONTRACTOR

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

9. INSURANCE

During the term of this agreement, FCMAT shall maintain liability insurance of not less than \$1 million unless otherwise agreed upon in writing by the district, automobile liability insurance in the amount required under California state law, and workers' compensation as required under California state law. Upon the request of the district and the receipt of the signed study agreement, FCMAT shall provide certificates of insurance, with Armona Union Elementary School District named as additional insured, indicating applicable insurance coverages.

10. HOLD HARMLESS

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

11. COVID-19 PANDEMIC

Because of the existence of COVID-19 and the resulting shelter-at-home orders, local educational agency closures and other related considerations, at FCMAT's sole discretion, the Scope of Work, Project Costs, Responsibilities of the District (Sections I, IV and V herein) and other provisions herein may be revised. Examples of such revisions may include, but not be limited to, the following:

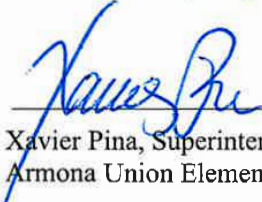
- A. Orientation and exit meetings, interviews and other information-gathering activities may be conducted remotely via telephone, videoconferencing, etc. References to on-site work or fieldwork shall be interpreted appropriately given the circumstances.
- B. Activities performed remotely that are normally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

12. FORCE MAJEURE

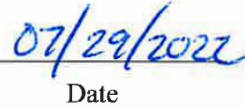
Neither party will be liable for any failure of or delay in the performance of this study agreement due to causes beyond the reasonable control of the party, except for payment obligations by the district.

13. CONTACT PERSON


Name: Xavier Pina
Telephone: (559) 583-5000
E-mail: xpina@aesd.org



Xavier Pina, Superintendent
Armona Union Elementary School District



Date



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

7/29/22

Date

Appendix B

Sample Custodial Handbook

[Click here to download a Microsoft Word version of the sample custodial handbook.](#)

Appendix C

Sample Training Matrix

Applies to (Job Types)	Subject (A-Z)	Legal Reference	Training Frequency	Length
M&O, Industrial Arts	Acetylene & Fuel Gas Safety	Title 8-1740	Initial Hire	Discretionary
Custodians, Nurses, Health Clerks, Food Service	Antimicrobial Pesticides	Title 8-3203, 5194	Prior to Use	Discretionary
M&O, Grounds, Custodial, Mechanics, Technology	Asbestos General Awareness Class IV Work	Title 8-1529, 5208, AHERA, Ed. Code 49410	Initial Hire & Annually	2 Hours
M&O Disturbing ACM or PACM	Asbestos Class III Work	Title 8-1529, 5208, AHERA, Ed. Code 49410	Initial Hire & Annually	16 Hours
M&O, Grounds	Back Injury Prevention / Lifting	Risk Management Practices, Title 8-3203, 5110	Employees who Lift	Discretionary
M&O, Grounds, Auto Shop, Golf Cart Operators, Mechanics	Battery Charging/Handling	Title 8-5185	Initial Hire	Discretionary
All employees or employees who are exposed to human blood or blood containing fluids	Bloodborne Pathogens	Title 8-5193	Initial Hire & Annually	Discretionary
M&O, Grounds	Carcinogens as Listed	Title 8-5209	Initial Hire	Discretionary
M&O, Custodial, Warehouse	Compaction Equipment	Title 8-4355	Prior to Use	Discretionary
M&O, Industrial Arts, ASB	Compressed Air & Gas	Title 8-3301 & 4650	Prior to Use	Discretionary
M&O or employees entering vaults, tanks, sewers, manholes, etc.	Confined Spaces	Title 8-5156 thru 5159	Prior to Entry / Annually	Discretionary
M&O, Grounds	Cranes & Hoists	Title 8-5006	Prior to Use	Discretionary
Custodians	Custodial Safety	Risk Management Practices, Title 8-3203	Initial Hire	Discretionary
M&O, Industrial Art/Technology Teachers, Aides	Demolition	Title 8-1734, 1735, 1736	Prior to Demo	Discretionary
M&O, Grounds	Electrical Safety	Title 8-2320.2, 2940	Initial Hire	Discretionary
M&O or employees working on an unguarded surface more than 7½ off the ground	Fall Protection	Title 8-1671, 1670, 3209, 3210, 3212	Initial Hire	Discretionary
All employees or designated users	Fire Extinguishers	Title 8-6151	Initial Hire & Annually for Designated Users	Discretionary
M&O, Grounds, Warehouse	Forklifts	Title 8-3664, 3657, 3664, 3668	Prior to Use & Every 3 Years	Discretionary
Grounds	Grounds Safety	Risk Management Practices, Title 8-3203	Initial Hire	Discretionary
M&O, Custodial, Industrial Tech, Technology	Hand Tools	Title 8-3310, 3426, 3556	Prior to Use	Discretionary

Applies to (Job Types)	Subject (A-Z)	Legal Reference	Training Frequency	Length
Potentially all employees, employees using or exposes to chemicals in the workplace	Hazard Communication/ Right to Know	Title 8-5194	Initial Hire & Annually	Discretionary
M&O, Custodial, Science, Photography, Health Clerks, Nurses	Hazardous Waste Management	Ed. Code 49340, Title 8-5164,5194	Initial Hire	Discretionary
M&O or employee exposed to excessive noise over the TWA	Hearing Protection & Conservation	Title 8-5097, 5098, 5099	Initial Hire & Annually if Program in Place	Discretionary
M&O or employees exposed to heat sources	Heat Illness Prevention	Title 8-3395	Prior to Working in Heat	Discretionary
M&O, Grounds	Housekeeping	Title 8-3203, 3362, 3364, 3321, 5551, 5552	Initial Hire	Discretionary
M&O, Grounds	Injury & Illness Prevention Program (IIPP) Workplace Injury & Illness Prevention	Title 8-3203	Initial Hire	Discretionary
M&O, Grounds	Indoor Air Quality	Title 8-5142	Initial Hire	Discretionary
M&O, Grounds	Job Hazard(s)	Title 8-3203	Before Job Assignment, New Hazards	Discretionary
M&O, Grounds	Ladders	Title 8-1675,3276	Prior to Use / As Needed	Discretionary
M&O, Industrial Technology	Laser Equipment	Title 8-1801	Initial Hire	Discretionary
M&O	Lead & Lead Standard	Title 8-1532, 5198	Annually	2 hour awareness
M&O, Custodial, Industrial Tech or employees performing maintenance on electrical circuits or machinery	Lockout/Tagout Control of Hazardous Energy	Title 8-3314	Initial Hire / As Needed	Discretionary
M&O, Custodial, Industrial Tech	Machine Safeguarding	Title 8-3203	Initial Hire / As Needed	Discretionary
M&O, Custodial, Industrial Tech	Material Handling & Storage	Title 8-3203, 5541	Initial Hire	Discretionary
Custodial, Nurses, Health Clerks	Medical Waste Management	Title 8-5193 H & S Code 117600-118360	Annually	Discretionary
M&O, Industrial Technology	Metal Working (forging) Machines	Title 8-4243	Initial Hire	Discretionary
M&O, Grounds, Custodial, Industrial Technology	Miter Saws	Title 8-4307	Initial Hire	Discretionary
All employees that operate vehicles on district business	Mobile Communications	Vehicle Codes	As Needed	Discretionary
M&O, Auto Shops, Mechanics, Bus Drivers	Natural Gas Fuel Tanks on Vehicles	Title 8-544	Initial Hire	Discretionary
All Employees	New Employee Safety Orientation	Title 8-3203	Initial Hire	Discretionary
M&O, Grounds, Custodial, Industrial Tech, Technology, Science, Nurses, Health Clerks	Personal Protective Equipment	Title 8-3380 - 3387	Prior to Use	Discretionary
Grounds, Custodial, Pool Maintenance	Pesticide Safety	Title 8-5194, AB 2260, Dept. of Ag.	Annually	Discretionary
M&O, Grounds, Mechanics, Industrial Tech	Pneumatic Tools	Risk Management Practices, Title 8-3203, 3300, 3559	Prior to Use	Discretionary

Applies to (Job Types)	Subject (A-Z)	Legal Reference	Training Frequency	Length
M&O, Grounds	Poisonous Plants and Harmful Animals	Title 8-3421	Initial Hire	Discretionary
M&O, Custodial, Industrial Tech, Technology	Portable Power Tools	Title 8-3310, 3425, 3556	Prior to Use	Discretionary
M&O, Industrial Technology	Powder-Actuated Tools	Title 8-1685, 1689	Initial Hire	Discretionary
M&O, Industrial Technology	Power Presses	Title 8-4203, 4208	Initial Hire/ Annually	Discretionary
M&O or users of any type of respiratory protection other than dusks masks	Respiratory Protection	Title 8-5144, 1531	Prior to Use / Annually	Discretionary
M&O, Industrial Technology	Roofing Operations	Title 8-1509, 1730	Initial Hire	Discretionary
M&O, Grounds, Ag Technology	Seat Belts (In vehicles with ROPS)	Title 8-3653, 6309	Initial Hire	Discretionary
M&O, Industrial Technology, Performing Arts	Scaffolds	Title 8-1637, 1658	Initial Hire	Discretionary
M&O, Grounds	Slips, Trips and Fall Prevention	Risk Management Practices, Title 8-3203	As Needed	Discretionary
M&O, Transportation, Facilities	Storm Water Pollution Prevention	State Water Resources Control Board	As Needed	Discretionary
M&O, Industrial Technology	Structural Wood Framing	Title 8-1716	Initial Hire	Discretionary
Transportation, M&O	Transportation Drug Testing	CFR Title 49, CVC 12517	Initial Hire / As Needed	Discretionary
Grounds	Tree Maintenance	Title 8-3420 thru 3428	Initial Hire / As Needed	Discretionary
M&O, Grounds	Trenching & Shoring	Title 8-1540, 1541	Prior to Digging / As Needed	Discretionary
Custodial, M&O	Universal Waste Management	Title 22	Initial Hire / As Needed	Discretionary
M&O, Grounds, Custodial, Administration or employees that operate utility carts, etc.	Utility Vehicles & Golf Carts	Risk Management Practices, Title 8-3203	Prior to Use / As Needed	Discretionary
M&O, Industrial Tech	Welding	Title 8-4799, 4848, 8357, 4850, 4853	Prior to Use	Discretionary
M&O, Industrial Tech	Woodworking Machines	Title 8-Article 59,	Prior to Use	Discretionary
M&O, Grounds, Custodial	Work Platforms(elevating) and Aerial Devices	Title 8 -3636, 3648, 3646, 3638, 3294	Prior to Use	Discretionary

A qualified person is a person designated by the employer; and by reason of **training**, experience, or instruction has demonstrated the ability to perform safely all assigned duties; &, when required is properly licensed in accordance with federal, state, or local laws and regulations.

A competent person is a person who is capable of identifying existing and predictable hazards in the surroundings or working conditions that are unsanitary, hazardous, or dangerous to employees. The competent person has the authority to impose prompt corrective measures to eliminate these hazards.

ACCURACY; CONTENT. FCMAT IS NOT RESPONSIBLE FOR THE ACCURACY OF ANY OPINIONS, ADVICE, REPRESENTATIONS OR INFORMATION CONTAINED IN THE FCMAT PRODUCT(S) (TRAINING MATRIX FOR SCHOOL DISTRICT EMPLOYEES), FOR ANY DATA INPUT OR CHANGES, OR ANY THIRD PARTY'S RELIANCE THEREON. You acknowledge and agree that: (a) FCMAT may, from time to time, elect to update the FCMAT Products, but FCMAT does not warrant or guarantee that any FCMAT Products will be updated, or that any updates will be made available to you, at any time; (b) FCMAT does not assume, and expressly disclaims, any obligation to obtain and include any information in the FCMAT Products; (c) FCMAT is not advocating the use of any product described in the FCMAT Products (or elsewhere), nor is FCMAT responsible for misuse of a product due to typographical or other errors in the FCMAT Products, your negligence or otherwise; (d) you will use the content included in the FCMAT Products only as a reference aid, and that such content is not intended to be (nor should it be used as) a substitute for the

exercise of professional judgment. In view of the possibility of human error or changes, you should confirm the content in the FCMAT Products through your own independent sources.

Original documents on which the above matrix and disclaimer are based were developed by the San Luis Obispo County Schools Insurance Program for Employees (SIPE) (www.slosipe.org), a joint powers authority established in 1977.