

## *Transportation Management Practices and Their Associated Indicators*

### *Identifying Information of Respondent Completing Form*

**Name:** \_\_\_\_\_

**Telephone No.** \_\_\_\_\_

**Position:** \_\_\_\_\_

**Email Address:** \_\_\_\_\_

**School:** \_\_\_\_\_

**Years associated with this charter school?**  
 1 – 3 Years \_\_\_; 4 – 6 Years \_\_\_; 7+ Years \_\_\_

If these do not apply, simply mark them “not applicable”.

| <i>Best Practices and Indicators</i> | <i>Yes</i> | <i>No</i> | <i>Unknown</i> | <i>Explanation/Documentation</i> |
|--------------------------------------|------------|-----------|----------------|----------------------------------|
|--------------------------------------|------------|-----------|----------------|----------------------------------|

**Planning, Organization and Staffing**

|   |  |  |  |  |
|---|--|--|--|--|
| <b>1. The charter school’s long-term planning and budgeting for student transportation within the context of community planning.</b>  |  |  |  |  |
| a. Transportation staff conduct a systematic assessment of transportation needs to identify priorities and basic needs. The process includes consideration of all current and anticipated budget categories and potential areas of transportation cost savings such as reducing the number of courtesy riders service, reducing the number of spare buses, realigning routes, purchasing larger buses, etc. As part of the budget process, transportation administrators present cost-savings options to the charter school board and public. |  |  |  |  |
| b. Transportation staff consult regularly with the administration to ensure that transportation needs, concerns, and costs are considered when planning for future needs.   |  |  |  |  |
| c. Transportation staff consult regularly with community planners to identify areas in the service area where community growth and development will have an impact on the need for transportation services in the future.   |  |  |  |  |
| d. Transportation consult regularly with the administration to develop and present factual information for the board and public on the student transportation cost implications for the charter school educational program decisions.   |  |  |  |  |
| <b>2. The charter school provides regular, accurate, and timely counts to the California Department of Education of the number of students transported as part of the reporting system.</b>   |  |  |  |  |
| a. Transportation staff regularly review the student count information to identify trends and issues that may require managerial or budgetary responses and that may result in cost savings within the present time frame or in the future.   |  |  |  |  |

## *Transportation Management Practices and Their Associated Indicators*

| <i>Best Practices and Indicators</i>   | <i>Yes</i> | <i>No</i> | <i>Unknown</i> | <i>Explanation/Documentation</i> |
|--|------------|-----------|----------------|----------------------------------|
| <b>3. The transportation office plans, reviews, and establishes bus routes and stops to provide cost-efficient student transportation services for all students who qualify for transportation.</b>  |            |           |                |                                  |
| a. Route planning staff annually use a systematic approach to create and update bus routes (including computer routing) and bus stops that are effective and cost-efficient without compromising safety. Existing bus routes and stops are reviewed on an annual basis for effectiveness, cost-efficiency, and safety.   |            |           |                |                                  |
| b. Route planning staff respond promptly to complaints or suggestions received from charter school staff, parents, or the general public about current or proposed bus routes or a driver's performance on an official assignment.   |            |           |                |                                  |
| c. Route planning staff (or their designees) regularly review with the responsible local or state agency having road jurisdiction to identify and document where hazardous walking conditions exist. The charter school works cooperatively with the local or state agencies whenever possible to eliminate hazardous walking conditions. Walking conditions that cannot be made safe are reported to the Department of Education, California Highway Patrol, or municipal agency. |            |           |                |                                  |
| d. The charter school's policy and practice are not to provide service to other students who do not attend the charter school.   |            |           |                |                                  |
| e. The board has adopted staggered school start times to help ensure that the charter school buses can serve as many students as possible (i.e., maximize the average bus occupancy). Alternatively, the charter school can demonstrate through a financial analysis that staggered school start times would not make student transportation more cost-efficient.  |            |           |                |                                  |
| f. The charter school's routing practices result in reasonably high average bus occupancy, and low cost per mile and student, compared to other school systems with similar demographics and educational programs.   |            |           |                |                                  |
| <b>4. The organizational structure and staffing levels of the charter school's transportation program minimize administrative layers and processes.</b>  |            |           |                |                                  |
| a. The charter school periodically reviews the transportation program's organizational structure and staffing levels to ensure that administrative layers and processes are minimized. Input for the review includes staff feedback and structure/   |            |           |                |                                  |

## *Transportation Management Practices and Their Associated Indicators*

| <b><i>Best Practices and Indicators</i></b>   | <b><i>Yes</i></b> | <b><i>No</i></b> | <b><i>Unknown</i></b> | <b><i>Explanation/Documentation</i></b> |
|---|-------------------|------------------|-----------------------|---|
| staffing levels comparisons with selected peer school systems.  |                   |                  |                       |   |
| b. The charter school can demonstrate the program has an appropriate structure (including reasonable lines of authority and spans of control) and staffing levels based on applicable comparisons and/or benchmarks.  |                   |                  |                       |   |
| c. The charter school reports organizational structure and administrative staffing review findings in writing and distributes these findings to board members and the public.   |                   |                  |                       |   |
| <b>5. The charter school maintains an effective staffing level in the vehicle maintenance area and provides support for vehicle maintenance staff to develop their skills.</b>  |                   |                  |                       |   |
| a. Charter school staff periodically evaluate the level of vehicle maintenance staffing and make adjustments as necessary to operate a cost-efficient operation.  |                   |                  |                       |   |
| b. The charter school sends all vehicle maintenance staff to courses and training sessions to improve current skills, develop special expertise not currently represented in the vehicle maintenance shop, and become familiar with emerging technology and techniques.   |                   |                  |                       |   |
| c. The charter school provides regular in-service training opportunities for vehicle maintenance staff to receive instruction on charter school maintenance policies and procedures, including topics of current interest and concern.  |                   |                  |                       |   |
| <b>6. The charter school effectively and efficiently recruits and retains the bus drivers and attendants it needs.</b>  |                   |                  |                       |   |
| a. The charter school notifies the public of job opportunities for bus drivers, substitute bus drivers, and bus attendants. The charter school uses a variety of approaches and activities to reach individuals likely to be interested in such employment options, and takes advantage of effective low-cost venues whenever possible. |                   |                  |                       |   |
| b. The charter school assesses its turnover rate for drivers and attendants and makes changes to practices as necessary to retain drivers and effectively recruit replacements.   |                   |                  |                       |   |
| c. Transportation staff collect information on wages and benefits offered by adjacent school systems and by local employers that are likely to be competing for the pool of applicants for positions as bus drivers, substitute bus drivers, and bus  |                   |                  |                       |   |

## *Transportation Management Practices and Their Associated Indicators*

| <i>Best Practices and Indicators</i>  | <i>Yes</i> | <i>No</i> | <i>Unknown</i> | <i>Explanation/Documentation</i> |
|---|------------|-----------|----------------|----------------------------------|
| attendants in the charter school. Staff regularly uses this information to compare the charter school's relative competitiveness for these positions when recruiting replacement drivers and attendants and setting salaries and benefits.  |            |           |                |                                  |
| d. The charter school provides bus drivers and attendants with incentives, financial or otherwise, for good performance as demonstrated by their safety records, timeliness, attendance, and ability to maintain discipline on the bus.   |            |           |                |                                  |
| <b>7. The charter school trains, supervises, and assists bus drivers to enable them to meet bus-driving standards and maintain acceptable student discipline on the bus.</b>  |            |           |                |                                  |
| a. Transportation staff provide or contract for the initial training required for prospective bus drivers to receive a commercial driver's license.   |            |           |                |                                  |
| b. The transportation office provides periodic in-service training (including the required annual training) for bus drivers, substitute bus drivers, and bus attendants that includes topics needed to keep licenses current along with other charter school transportation needs and concerns. |            |           |                |                                  |
| c. Training meets the concerns and needs expressed by drivers and attendants in periodic meetings with transportation management.   |            |           |                |                                  |
| d. The transportation office provides regular direct oversight, at least annually, of basic bus handling skills, safe driving practices, and pupil management techniques of all bus drivers.  |            |           |                |                                  |
| e. The charter school ensures that all bus drivers receive annual physical examinations as required by statute and maintains records of these examinations.   |            |           |                |                                  |
| f. The board has adopted and enforces a safe driver policy that establishes when or if bus drivers with traffic violations charged against them are able to continue driving.   |            |           |                |                                  |
| g. The charter school has considered implementing a policy for recouping training costs for bus drivers who terminate their employment within one year from being hired.  |            |           |                |                                  |
| <b>8. The charter school has a process to ensure that sufficient vehicles are acquired economically and will be available to meet the charter school's current and future transportation needs.</b>   |            |           |                |                                  |
| a. The board has adopted a policy addressing the cost-effective replacement of school buses and other charter school vehicles. The replacement policy   |            |           |                |                                  |

## *Transportation Management Practices and Their Associated Indicators*

| <i>Best Practices and Indicators</i>   | <i>Yes</i> | <i>No</i> | <i>Unknown</i> | <i>Explanation/Documentation</i> |
|--|------------|-----------|----------------|----------------------------------|
| should include criteria such as age of the vehicle, vehicle mileage, and maintenance costs vs. vehicle value. The board periodically reviews this policy for any revisions that may be needed.   |            |           |                |                                  |
| b. Charter school staff maintains records of charter school vehicle purchases over a multi-year period to document that the charter school's vehicle replacement standards are being met and that sufficient allowance has been made for both projected growth and accommodation of board program decisions that have an impact on the need for charter school vehicles. |            |           |                |                                  |
| c. Charter school staff minimize the number of spare vehicles but ensures that enough spare vehicles are available when needed to cover special situations that may reasonably be expected to occur. Staff evaluates past situations when spare buses were needed but were not available and make adjustments as necessary.  |            |           |                |                                  |
| d. Transportation staff maintain regularly updated records on the numbers and types of vehicles in the charter school.   |            |           |                |                                  |
| e. The charter school uses the California Department of Education's annual pool purchase agreements or annual vehicle purchasing contracts (as applicable) to minimize cost and maximize value unless the charter school is able to obtain equivalent vehicles at lesser costs.  |            |           |                |                                  |
| f. Charter school staff receive and inspect new vehicles. New buses are phased into service so that buses are assigned to routes with the greatest need, while older buses are rotated to shorter or smaller routes, used as spare buses, or removed from service.   |            |           |                |                                  |
| g. The charter school regularly conducts and documents its reviews of costs related to older vehicles to determine whether they should be maintained in service or not.  |            |           |                |                                  |
| h. When the charter school removes vehicles from service it recovers as much value as possible.  |            |           |                |                                  |
| <b>9. The charter school provides timely routine servicing for buses and other charter school vehicles, as well as prompt response for breakdowns and other unforeseen contingencies.</b>  |            |           |                |                                  |
| a. The charter school provides required inspections for all buses used to transport students. The schedule is distributed to bus drivers and other staff, and timely reminders are issued to ensure that drivers remember to report to vehicle maintenance on their assigned days.   |            |           |                |                                  |

## *Transportation Management Practices and Their Associated Indicators*

| <i>Best Practices and Indicators</i>  | <i>Yes</i> | <i>No</i> | <i>Unknown</i> | <i>Explanation/Documentation</i> |
|---|------------|-----------|----------------|----------------------------------|
| b. The transportation office ensures that all bus drivers inspect their buses prior to each bus run and maintain records of such inspections as required by State Board of Education Rules.   |            |           |                |                                  |
| c. The charter school documents quality control reviews of the servicing and repair work done on vehicles.  |            |           |                |                                  |
| d. The charter school has a preventive maintenance program for vehicles to provide timely routine servicing that may be on a schedule that differs from calendar-based servicing such as mileage-based servicing.   |            |           |                |                                  |
| e. Charter school staff has established guidelines to assist in making cost-effective decisions about whether to make complex or expensive repairs on older vehicles.   |            |           |                |                                  |
| f. Charter school staff ensure that all charter school vehicles are serviced in a timely and cost-effective manner. Charges/credit for services are made to the appropriate department(s).  |            |           |                |                                  |
| g. Charter School staff maintain a vehicle maintenance management system to provide data on the maintenance costs, performance, and operations of buses and other vehicles.   |            |           |                |                                  |
| <b>10. The charter school ensures that fuel purchases are cost-effective and that buses and other vehicles are efficiently supplied with fuel.</b>  |            |           |                |                                  |
| a. Charter school departments cooperate with purchasing office staff to develop purchasing arrangements with vendors to ensure that the charter school receives the most favorable rates available.   |            |           |                |                                  |
| b. Charter school staff have established procedures to determine when orders to replenish the charter school's fueling stations should be placed. Also, if exceptions occur, staff should have a specific justification or otherwise analyze the circumstances to ensure that exceptions will not recur.              |            |           |                |                                  |
| c. The charter school has secure fueling stations for buses and other vehicles that are convenient and accessible. Charter school staff periodically review whether there are enough locations and whether they are efficiently sited. If not, they make recommendations for change to charter school administrators. |            |           |                |                                  |
| d. Charter school staff have implemented controls over the fueling system to ensure its security and the accuracy of its records. If the charter school   |            |           |                |                                  |

## *Transportation Management Practices and Their Associated Indicators*

| <i>Best Practices and Indicators</i>  | <i>Yes</i> | <i>No</i> | <i>Unknown</i> | <i>Explanation/Documentation</i> |
|---|------------|-----------|----------------|----------------------------------|
| does not use an automated fueling system, staff should be able to justify why that would not be cost-effective for the charter school.  |            |           |                |                                  |
| e. The charter school ensures that departments using the fueling stations are appropriately billed/credited.  |            |           |                |                                  |
| f. Charter school staff cooperate with governmental environmental agencies charged with conducting environmental inspections of fueling stations. Staff maintain records of all such inspections, and if deficiencies are encountered, they take prompt action to correct them.   |            |           |                |                                  |
| <b>11. The charter school maintains facilities that are conveniently situated to provide sufficient and secure support for vehicle maintenance and other transportation functions.</b>  |            |           |                |                                  |
| a. All charter school vehicle service centers have a shop layout that allows technicians to work most of the time in covered areas, and technicians have ready access to the specialized tools and support they need to do their job.   |            |           |                |                                  |
| b. Charter school staff have established procedures to control and minimize the generation of any hazardous wastes from charter school vehicle service centers, and any hazardous wastes that are generated are safely and securely stored in accordance with state and federal requirements.   |            |           |                |                                  |
| c. All charter school vehicle service centers include needed storage space for parts, tires, supplies, and related equipment, and access to them is controlled. All charter school vehicle service centers include areas for supporting functions such as computer data entry, paperwork processing, and records storage. All charter school vehicle service centers are securely fenced and lighted, and vehicle routing and parking options are clearly marked. |            |           |                |                                  |
| d. The charter school ensures that charter school vehicles are securely parked when not in use.   |            |           |                |                                  |
| e. Charter school staff periodically review the sufficiency and efficiency of transportation physical facilities and evaluate the feasibility and desirability of satellite vehicle servicing areas.  |            |           |                |                                  |
| <b>12. The charter school maintains an inventory of parts, supplies, and equipment needed to support transportation functions that balances the concerns of immediate need and inventory costs.</b>   |            |           |                |                                  |
| a. The charter school maintains a “just in time” inventory of all parts and supplies to minimize the size and cost of inventory while providing needed support to charter school transportation functions.  |            |           |                |                                  |

## *Transportation Management Practices and Their Associated Indicators*

| <i>Best Practices and Indicators</i>   | <i>Yes</i> | <i>No</i> | <i>Unknown</i> | <i>Explanation/Documentation</i> |
|--|------------|-----------|----------------|----------------------------------|
| b. The charter school obtains on a continuing basis those parts, supplies, and services that are needed to support charter school transportation functions in a cost-effective manner. Such items and services can be obtained using methods such as competitive bids, local pool purchases, pre-negotiated state contracts, and discounted blanket purchase orders. |            |           |                |                                  |
| c. Transportation-related parts room staff review all parts, supplies, and services when they are received to ensure that the correct items were delivered, the billing price is correct, and services were satisfactory. All transportation-related parts and supplies are inventoried and tracked via a computer system.   |            |           |                |                                  |
| d. The charter school ensures that transportation-related warranty claims are made against manufacturers or vendors whenever possible. Warranty repairs will be performed in-house if shown to be a cost-effective method to make such repairs.  |            |           |                |                                  |
| e. The charter school has controls to prevent the inappropriate use of facilities and supplies, and it maintains the security of parts and supplies in the transportation area.  |            |           |                |                                  |

### **Operations, Management, and Accountability**

|   |  |  |  |  |
|---|--|--|--|--|
| <b>13. The charter school ensures that all regular bus routes and activity trips operate in accordance with established routines and any unexpected contingencies affecting vehicle operations are handled safely and promptly.</b>   |  |  |  |  |
| a. The charter school has an effective process for responding to vehicle breakdowns, and it is clear who should be notified and when. Charter school procedures address the roles and responsibilities of bus drivers, operations staff, vehicle maintenance staff, and charter school staff. |  |  |  |  |
| b. The charter school has an effective process for bus drivers to report their own intention to miss work as soon as possible and for operations staff to respond to those absences with substitute drivers or other solutions.   |  |  |  |  |
| c. The charter school effectively responds to bus overcrowding situations. Responses address the immediate situation, and, when appropriate, provide for longer-term solutions, such as a redesign of affected bus routes.  |  |  |  |  |
| d. Transportation staff maintain records of the number of students who ride longer than recommended ride time standard (or the local ride time standard if the  |  |  |  |  |

***Transportation Management Practices and Their Associated Indicators***

| <b><i>Best Practices and Indicators</i></b>  | <b><i>Yes</i></b> | <b><i>No</i></b> | <b><i>Unknown</i></b> | <b><i>Explanation/Documentation</i></b> |
|--|-------------------|------------------|-----------------------|---|
| board has adopted a more stringent standard) and take actions to minimize this number when possible.   |                   |                  |                       |   |
| e. The board has adopted and implemented a policy on the circumstances under which a bus driver may discharge a student at any stop other than the one the student usually uses.   |                   |                  |                       |   |
| f. The charter school has written a process for staff to request and pay all transportation costs (including operational and administrative costs) for all educational, extracurricular, and athletic activity trips. Implementation of these procedures is demonstrated in activity trip records. |                   |                  |                       |   |
| <b>14. The charter school provides efficient transportation services for exceptional students in a coordinated fashion that minimizes hardships to students.</b>   |                   |                  |                       |   |
| a. Transportation staff and exceptional student education staff communicate and consult regularly about student transportation services for exceptional students.  |                   |                  |                       |   |
| b. The charter school policy, along with charter school exceptional student education guidelines, ensure that exceptional students ride a regular school bus whenever possible and appropriate.  |                   |                  |                       |   |
| c. Exceptional student education staff and transportation staff identify exceptional students who qualify for Medicaid funding for certain approved bus runs. The charter school makes claims for Medicaid reimbursement for transporting those students.  |                   |                  |                       |   |
| d. For any exceptional education students who cannot be accommodated on charter school buses, suitable alternative arrangements are made such as specialized medical transport or parental transportation.   |                   |                  |                       |   |
| <b>15. The charter school ensures that staff act promptly and appropriately in response to any accidents or breakdowns.</b>  |                   |                  |                       |   |
| a. The transportation office equips all school buses with two-way communications devices and staff monitor communications at all times when buses are in service.  |                   |                  |                       |   |
| b. The charter school has an effective process for responding to vehicle breakdowns and it is clear who should be notified and when. Charter school procedures address the roles and responsibilities of charter school staff including bus drivers, operations staff, vehicle maintenance staff,  |                   |                  |                       |   |

***Transportation Management Practices and Their Associated Indicators***

| <b><i>Best Practices and Indicators</i></b>   | <b><i>Yes</i></b> | <b><i>No</i></b> | <b><i>Unknown</i></b> | <b><i>Explanation/Documentation</i></b> |
|---|-------------------|------------------|-----------------------|---|
| business office, and school site staff. These procedures are periodically reviewed in training sessions with copies of the procedures carried on each charter school vehicle.   |                   |                  |                       |   |
| c. The charter school maintains complete records of all accidents that occur and promptly reports all qualifying accidents to the board, California Department of Education, and California Highway Patrol.   |                   |                  |                       |   |
| <b>16. The charter school ensures that appropriate student behavior is maintained on the bus with students being held accountable for financial consequences of misbehavior related to transportation.</b>  |                   |                  |                       |   |
| a. Bus drivers report disciplinary infractions directly to the administration. Administration report to drivers what disciplinary actions were taken.   |                   |                  |                       |   |
| b. Charter school policy and procedures require that parents of students damaging buses be assessed repair costs.   |                   |                  |                       |   |
| <b>17. The Charter school provides appropriate technological and computer support for transportation functions and operations.</b>  |                   |                  |                       |   |
| a. The transportation office has a computerized management information system that administrators use to produce reliable and timely budgeting and expenditure information on student transportation functions, as well as basic performance data for the office. This system is coordinated with other charter school systems. |                   |                  |                       |   |
| b. The charter school maintains computerized data that enables it to record and track information on transportation staff training and certifications, driver’s license data, substance abuse testing, and personnel performance.   |                   |                  |                       |   |
| c. Transportation administrators, with the assistance of charter school information systems staff, periodically review their current level of technological and computer support to identify issues, needs for the future, and coordination with other charter school systems.  |                   |                  |                       |   |
| <b>18. The charter school monitors the fiscal condition of transportation functions by regularly analyzing expenditures and reviewing them against the budget.</b>  |                   |                  |                       |   |
| a. The approved budget for transportation includes appropriate categories by which expenditures may be usefully tracked. Transportation staff systematically review expenditures against the  |                   |                  |                       |   |

***Transportation Management Practices and Their Associated Indicators***

| <b><i>Best Practices and Indicators</i></b>   | <b><i>Yes</i></b> | <b><i>No</i></b> | <b><i>Unknown</i></b> | <b><i>Explanation/Documentation</i></b> |
|---|-------------------|------------------|-----------------------|---|
| budget for these categories. Administrators respond promptly to cost control issues raised during such reviews and identify what actions must be taken, by whom, and when.  |                   |                  |                       |   |
| b. Vehicle maintenance staff in the transportation office maintain current records of all maintenance and repairs conducted on all vehicles, and the costs associated with those repairs. They review those records regularly to identify maintenance cost concerns, such as unexpected patterns of maintenance activity, excessive costs, or high costs associated with particular types or ages of buses. |                   |                  |                       |   |
| c. The charter school has taken advantage of significant opportunities to improve transportation management, increase efficiency and effectiveness, and reduce costs.   |                   |                  |                       |   |
| <b>19. The charter school has reviewed the prospect for privatizing transportation functions, as a whole or in part.</b>  |                   |                  |                       |   |
| a. Transportation staff have developed key unit cost information for student transportation functions and tasks to enable them to make comparisons with those of private providers.   |                   |                  |                       |   |
| b. Transportation staff periodically review the costs associated with transportation functions and tasks that could be conducted by private vendors. When the results of such reviews indicate savings to the charter school, staff arrange for such functions and tasks to be performed by private vendors.  |                   |                  |                       |   |
| c. Transportation staff conduct quality assurance checks for any transportation function or task performed by private vendors to ensure that work was conducted in accordance with the original agreement.  |                   |                  |                       |   |
| <b>20. The charter school has established an accountability system for transportation and regularly tracks and makes public reports on its performance in comparison with established benchmarks.</b>   |                   |                  |                       |   |
| a. The charter school has clearly stated goals and measurable outcome-oriented objectives for the student transportation program that reflect the intent (purpose) of the program addressing the major aspects of the program’s purpose and expenditures.   |                   |                  |                       |   |
| b. The charter school has identified other school systems it considers to be peers and exemplars against which it can compare its performance, and it can identify reasons for selecting those school   |                   |                  |                       |   |

## *Transportation Management Practices and Their Associated Indicators*

| <i>Best Practices and Indicators</i>  | <i>Yes</i> | <i>No</i> | <i>Unknown</i> | <i>Explanation/Documentation</i> |
|---|------------|-----------|----------------|----------------------------------|
| systems. The charter school makes regular comparisons of its own performance with those of the peers and exemplars.   |            |           |                |                                  |
| c. Transportation administrators have established appropriate performance and cost-efficiency measures and benchmarks, i.e., measurable targets for future performance, for key indicators of student transportation performance.   |            |           |                |                                  |
| d. Transportation administrators provide charter school administrators and the board an annual “report card” that shows actual performance for all selected performance and cost-efficiency measures in comparison with the selected benchmark for that indicator, the performance of peer school systems, and actual performance during the previous year. The charter school uses this information to assess performance and make management decisions. |            |           |                |                                  |
| e. In addition to “big picture” performance reporting, transportation administrators have established a system of regular management reports track daily and weekly performance for key functions.  |            |           |                |                                  |
| f. Is there other information that demonstrates the charter school’s use of this best practice that should be considered?   |            |           |                |                                  |