

PUPIL TRANSPORTATION MANAGEMENT MANUAL



**PROMOTING SAFETY AND EFFICIENCY
FOR KENTUCKY'S SCHOOL CHILDREN**



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CHAPTER 1

ADMINISTRATION

PUPIL TRANSPORTATION POLICIES AND REGULATIONS

The laws and regulations, which govern the operation of the pupil transportation systems, are found in the Kentucky Revised Statutes (KRS) and Kentucky Administrative Regulations (KAR) promulgated by the Kentucky Department of Education. These laws and regulations delegate certain powers and duties to the local Board of Education and Superintendent of the local school system. These regulations and statutes also place certain requirements on the local Board of Education and superintendent.

For Example: KRS 158.110 Transportation of Pupils: provide the authorization for local Boards of Education to provide pupil transportation. KRS 158.110 states:

1. Board of Education may provide transportation from their general funds or otherwise for any pupil of any grade to the nearest school to said pupil's residence within the district who does not live within a reasonable walking distance to such nearest school of appropriate grade level. The local board may provide transportation by means of a board-operated transportation system, transit authorities organized and operating pursuant to KRS Chapter 96A, local government mass transit systems and individual contracted buses and vehicles.
2. When space is not available at the nearest school, the Board of Education may provide transportation from their general funds or otherwise for any pupil of any grade who does not live within a reasonable walking distance to the nearest school of appropriate grade level where space is available. Transportation may be provided by means pursuant to subsection one (1) of this section.
3. Public elementary and secondary schools shall not change their present grade level structure without written permission from the State Board of Education.
4. A Board of Education shall adopt such rules and regulations as will ensure the comfort, health and safety of the children who are transported, consistent with the rules and regulations of the Kentucky Board of Education dealing with the transportation of pupils.

LOCAL BOARD POLICIES

KRS 158.110 and 702 KAR 5:030 outline, in general terms, what is required of the local Board and superintendent. The local Board of Education has broad power to regulate the local school system. In all cases the responsibility for compliance with the laws and regulations pertaining to pupil transportation will fall to the individual designated by the local Board to oversee the pupil transportation program within the school system. In some districts this will be a full time responsibility, while in others it may be one of many responsibilities and duties. Regardless, the person assigned with the supervision of the pupil transportation program must comply with all the laws and regulations.

This responsibility cannot be effectively carried out unless the local board has adopted good, sound policies and procedures. The legal responsibilities stated in the regulations are in broad terms. Many questions may arise which are not answered in the statutes. Local Boards of Education need to establish policies and procedures within the framework of the KRS and KAR. The adoption of local Board policies and procedures eliminate the need to make decisions in recurring situations; reduces pressure by special interest groups; permits consistency in the decisions of the school administration; solves many management problems before they occur; improves board/administration relations; maintains stability of relationships; raises staff morale through uniform and fair treatment; provides legal foundation on which to build a program; enables staff members to better understand their work in relation to the total school program; and defines the difference between Board members and administrative officials.

Policies and procedures will vary due to local conditions or situations, but there are a few general rules that should be followed:

1. Policies and procedures should always be in written form.
2. Policies and procedures must be kept up to date with changing conditions and changes in laws and regulations.
3. Policies and procedures should be subject to review and evaluation at periodic intervals by Board members, administrators, and staff.
4. The number of policies and procedures should be limited. It is not possible to write a policy or procedure to cover every situation that could occur.

Written board policies and procedures should include the following as a minimum:

1. Specify the extent of transportation services to be provided (including pupils entitled to transportation by law and the conditions, if any, under which it will be provided to pupils who do not qualify).
2. Describe rules of behavior for all transported pupils including discipline procedures.
3. Designate the person responsible for the enforcement of such rules of behavior.
4. Outline procedures for the use of buses for co-curricular activities, extra-curricular activities, and other groups permitted by law.
5. Set standards for the bus maintenance program in accordance with the maintenance program outlined in Chapter 6.
6. Establish requirements for the employment of transportation personnel.
7. Establish employment qualifications related to school bus driver Motor Vehicle Records (MVR) and Criminal Records Checks (CRC).
8. Establish maximum distance pupils are expected to walk to a school bus stop.
9. Establish policies defining what may or may not be transported on a school bus.

(SAMPLE BOARD POLICY)

ELIGIBILITY FOR BUS TRANSPORTATION

Students are eligible to be transported by bus to and from school regardless of their distance from school if traffic or other safety conditions make walking to school extremely hazardous as determined by the transportation director for the local district.

Persons not of school age, parents of students or persons not connected with schools are not permitted to ride the buses except with the express written permission of the superintendent.

Children who are eligible for special transportation shall be determined by the transportation director in conjunction with the SBARC (School Based Admissions and Release Committee) and must be spelled out in the pupil's IEP (Individualized Educational Program).

When safety and walking conditions do not make walking to and from school extremely hazardous, a pupil should reside one (1) mile or more from school before being eligible for transportation.

Students who attend a school outside their own attendance area and reside more than one (1) mile from the school of attendance may be provided transportation service under the rules of the "Hitcher Provision." The "Hitcher Provision" requires that, (1) the school bus does not add either time or mileage or in any way alter the designated bus route in order to provide service, (2) it is granted only if space is available on the bus, (3) students must obey all rules and regulations of the pupil transportation system, and (4) written request for transportation under the "Hitcher Provision" is made at least two (2) weeks prior to the opening of the school year (applies to students residing in the district at such time). The local transportation director shall be the approving authority for transporting under the "Hitcher Provision."

Legal Reference: KRS 158.110 Order 24
Page 9
Date 8-1-83

DUTIES AND RESPONSIBILITIES OF THE TRANSPORTATION DIRECTOR

Although the KRS's and KAR's give the responsibility for the operation of the pupil transportation program to the Board and superintendent, the daily task of ensuring that all aspects of the law are met and that the safe and efficient transportation of pupils occurs rests with the director or supervisor of pupil transportation. Pupil transportation is an integral part of the total school program. The time that children spend on buses is an important influence on their physical, mental, and moral well-being. It is important, therefore, that the personnel services related to transportation be sufficient to assure a safe, efficient and economical program. The standards achieved in pupil transportation will only be as high as the standards of the staff operating the program.

The vehicle, its maintenance, and the driver are the factors; which determine the safety and efficiency of the school transportation program. The director or supervisor of pupil transportation is the necessary catalyst to make these factors produce results. The right person, adequately trained and properly supported, should produce the safety and efficiency necessary for pupil/passenger protection and give general supervision of the pupil transportation program. The director or supervisor of pupil transportation is the superintendent's designee in charge of school bus service; is responsible for resolving all difficulties in daily school bus operation; is responsible for the coordination of all transportation services; recommends policy considerations to the district superintendent and the School Board and assumes direct responsibility for seeing that adopted policy is properly administered.

Responsibilities of the Director/Supervisor of Pupil Transportation:

1. Implement and interpret State laws and Kentucky Board of Education regulations that are related to pupil transportation.
2. Implement and administer the policies and procedures of the local Board of Education.
3. Assist in the development of the local pupil transportation policies and procedures (including the planning, budgeting and forecasting the needs of the pupil transportation operation).
4. Advise the superintendent and local Board of Education on matters involving pupil transportation, (including, but is not limited to, assisting in school site selection and development planning).
5. Work with administrators, teachers, drivers, maintenance and service personnel, students, parents, and various public and private agencies to improve the quality of the pupil transportation program.
6. Select and supervise school bus drivers (including securing substitute drivers) in accordance with state and local Board of Education regulations as well as local, state, and federal laws.

7. Develop written, uniform school bus operating procedures.
8. Work with the driver trainer instructor in developing safe and efficient routing of buses, determine when adjustments are necessary and the best way to make these adjustments. Determine travel time for students, walking distance to bus stops, bus time schedules, students to be picked up by each bus and hazardous walking areas. Maintain and distribute schedules to drivers and students being transported and identify all hazards on the route such as railroad crossings, narrow bridges, etc.
9. Keep pupil transportation maps up to date.
10. Develop rules for students riding school buses. Maintain discipline by implementing a well conceived and understood procedure for dealing with violations of the rules.
11. Develop and implement a fleet safety program. Keep a daily log on occurrences, incidents, complaints, etc. Require and maintain the necessary records and reports from drivers. Investigate all school bus incidents and road breakdown. Maintain up-to-date operational procedures for the purpose of reducing incidents and preventing road failures.
12. Observe the operation of the pupil transportation system by riding the buses, following the buses, and/or being present at or near the school bus loading areas and at locations along the routes or assign Driver Trainer Instructors these responsibilities.
13. Investigate all requests and complaints concerning the pupil transportation program.
14. Determine the number of school buses needed and the replacement schedule for the buses being utilized.
15. Develop and implement a comprehensive preventative maintenance program.
16. Supervise the maintenance program and the maintenance facilities.
17. When contract operators are employed by the district: (1) develop specifications for obtaining quotations on services offered by interested bidders and (2) oversee the pupil transportation operations provided by the contracted operator.
18. Schedule co-curricular and extra-curricular trips in accordance with the developed policies and procedures.
19. Act as liaison with the public, schools, public safety agencies, and the news media.
20. Attend safety seminars; training courses; and national, regional and state conferences and safety meetings, as these relate to the continued development and efficiency of the director or supervisor of pupil transportation.
21. Maintain relations with organizations which can assist in creating and maintaining a good health and safety program such as:
 - a. Service Organizations
 - b. Kentucky State Police

- c. Emergency Squads
- d. Physicians and Health Authorities
- e. Safety Organizations
- f. Fire Departments
- g. County or City Law Enforcement Officials
- h. County Judge Executives and Fiscal Court
- i. Railroad Personnel

It is recognized that there are many pupil transportation systems too small to fully justify a full time pupil transportation director/supervisor. In this case, the administrative staff or another staff member must assume all the responsibility. All the responsibilities listed must be performed regardless of the size of the school bus fleet. In small fleets, various staff members must see that all the responsibilities outlined are performed. Use of current staff, to include an outstanding driver, to carry out these responsibilities may be necessary. The operation of just one bus requires the accomplishment of all aspects of a good pupil transportation program. The only difference between the operations of a small fleet is the number of personnel needed to supervise and accomplish the tasks required to safely and efficiently transport pupils.

The duties of the director or supervisor of pupil transportation falls into several major categories. In some districts with small fleets, the duties may be assigned to one or more individuals but, in any event, all of the duties listed must be performed to ensure a safe, efficient and economical program.

Drivers

1. Selecting and approving all new drivers.
2. Improving the quality of drivers by allowing the establishment of an adequate and on-going in-service training program.
3. Keep drivers informed of laws and regulations.
4. Provide a recognition program for bus driver achievements.
5. Evaluate each driver's performance.

Vehicles

1. Be familiar with all state regulations for equipment and develop local standards as necessary.

2. Ensure pre-trip bus inspections are being performed in accordance with all applicable federal, state, and local laws and regulations.

Pupil Passengers

1. Work with principals and teachers in developing and implementing an active safety program for all pupils.
2. Arrange for four (4) emergency evacuation drills each school year.
3. Develop policies and procedures on discipline for adoption by the local Board of Education.
4. Provide for restricted loading and unloading zones at each school site.

Bus Routes

1. Arrange bus routes to prevent overloading of buses.
2. Review routes for possible hazards.
3. Improve efficiency of routes by consolidation, re-routing, or extensions. Note: Funding is based on students who are transported one (1) mile or more to/from school.
4. Determine location of school bus stops.

Personnel

1. Review all job applicants and make recommendations to the Superintendent before applications are considered by the local Board of Education.
2. Make recommendations for personnel action based on local Board policy.

Records

1. Disseminate information to drivers, parents, schools and local news media concerning school bus operation.
2. Review all requests and complaints concerning pupil transportation.
3. Relate the pupil transportation program to lay groups as a representative of the Superintendent and local Board.
4. Attend and participate in safety and highway group meetings.
5. Work cooperatively with local and state police, highway departments, state agencies and all other organizations working to improve safety on the highways.

Purchasing

1. Develop specifications and write bid proposals for the purchase of equipment.
2. Oversee the ordering of repair parts, equipment and other supplies.

Other Administrative and Supervisory Duties

1. Make recommendations to the Superintendent concerning school closing or early dismissal due to road or weather conditions and other safety factors affecting transportation.
2. Draft transportation policies and procedures for review and adoption by the local Board of Education.
3. Keep up to date on transportation laws and be prepared to interpret them and report to the Superintendent and others as needed.
4. Assist in preparing budget recommendations for the pupil transportation program.
5. Work with building principals in organizing a system to facilitate loading and unloading, controlling student and driver conduct, conducting emergency evacuation drills and instructing pupils on passenger safety, etc.
6. Strive to improve cooperation among teachers, students, drivers, mechanics and principals.

CHAPTER 2

OPERATIONAL PROCEDURES

TYPES OF PUPIL TRANSPORTATION SERVICE

In order to establish an adequate pupil transportation system at reasonable cost, local districts may find it necessary to utilize one or more of the following operational alternatives:

1. District-Owned and Operated System
2. Contracted Pupil Transportation System
3. Supplemental Contracts with Private Parties

District-Owned and Operated System

In most sections of the state, a district-owned bus fleet is the only viable alternative for providing transportation services. In many communities, public transportation or private contracting is not available. Complete control of personnel, equipment and facilities ensures the opportunity to establish the best possible system to serve the total educational program and provides the flexibility to make internal adjustments, which may be necessary to support program changes.

Contracted Pupil Transportation System

A school district may wish to explore the possibility of having a private contractor provide the necessary transportation services. Districts considering the contract alternative should refrain from entering into any agreement until all aspects are fully studied. Once the district has entered into a contractual agreement, it is essential to evaluate this alternative on a continuing basis to ensure that the service remains cost effective.

Private Party Contracts

In instances where small numbers of students live in a remote or isolated area or attend classes outside the district, the regular school bus system may not be the most efficient means to provide the required service. In such cases, a supplemental contract with a private party may prove to be the most efficient and economical of the available alternatives.

District officials are reminded that vehicles used to provide pupil transportation services under contracts are required to meet the provisions of all Kentucky Administrative Regulations related to contracted buses. The following regulations cover these provisions are in Appendix A.

702 KAR 5:030, Section 2, 10, 11, 22 and 23 - District Board Responsibilities and

702 KAR 5:130 Vehicles designed to carry fewer than nine (9) passengers

COMMUNICATIONS

In the operation of a school transportation system, it is necessary to keep those who are in charge of the operation, as well as the pupils' parents and the pupils themselves, informed regarding the operational policies and procedures. The school system must ensure that the channels of communication are set up in such a way that any information that should be known about its transportation system and services can be disseminated speedily and effectively to reach everyone concerned. The school system must also ensure that all inquiries, requests, suggestions and recommendations are given prompt and appropriate attention and that they are handled efficiently.

Some of the ways information regarding school bus operations can be disseminated satisfactorily and examples of how each of these may be used are:

Bulletins and Pamphlets - To explain the school system's transportation policies and procedures to school administrators, teachers, drivers, parents, students and others associated with the operation.

Meetings - To provide an opportunity for those associated with the school transportation operation to share their views regarding more effective methods.

Public Press - To inform parents of policy and procedure changes, route stops, schedule changes and the safety record of the operation.

Conference - To discuss with drivers and/or parents solutions to the disciplinary problems that occur and new/revised policy or procedure decisions that affect drivers, contractors and others.

Circular Letters - To inform parents of new routes that are planned or of changes that are to be made in routes, stops and schedules.

Telephone Calls - To provide quick contact between bus drivers and the school, or between parents and the school, in the event of immediate information sharing.

Radio, Television - To inform the public of the procedures schools will follow in case of severe weather conditions or other natural phenomena.

Letters - To inform parents and others regarding transportation policy and procedures.

Public Address System - To instruct students who are assembled to enter buses regarding rules and regulations they are to follow while waiting for and riding buses.

PLANNING BUS ROUTES

Suggested Materials and Information Needed

In establishing school bus routes, the basic materials and informational references listed below are necessary.

A map of the school district showing:

1. The district's or proposed district's boundary line;
2. The attendance area boundary lines if there is more than one attendance area;
3. All pupils' locations on map in a manner that identifies the school they will attend; and
4. A roster of all children eligible for pupil transportation. Note: This roster should be arranged to identify pupils in a particular geographic area and attendance area. This information can be obtained from school principals by reviewing rider lists, attendance records (for T-1's), by holding driver conferences, conducting surveys or through transportation requests, which result from pre-registration of pupils.

Most maps are drawn to a scale of one inch to the mile. The latest map available should be obtained so that the current road conditions will be accurately indicated. Maps may be obtained for a small charge from:

Kentucky Geological Survey
University of Kentucky
Room 104 MMRB
Lexington, Kentucky 40506-0107
Phone No. (859) 257-5500

Website: kgsweb.uky.edu/PubsSearching/orderinginfo.asp

A sheet of acetate should be placed over the map and secured with tape. The proposed routes can then be drawn with colored pens on the acetate. If changes are necessary, the lines can be wiped off without marring the map.

Computerized Routing programs are available. All districts should endeavor to use technology in the documentation of transportation records.

Bus Routing Principles

After locating attendance areas and the pupils to be transported, it is possible to define bus routes to serve them. In drawing bus routes, the principles listed below should be kept in mind. They are based primarily on consideration for the safety, welfare and convenience of the pupils to be transported. It is recognized that local conditions may require some deviation from these principles.

Routes should be set up on “shoe-string” or “spoke” basis when feasible. A “shoe-string” or “spoke” route is one, which provides for the first pupil pick-up at the point farthest from the school and then proceeds as directly as possible to the school. In general, the larger the district, the easier it is to organize routes on the “spoke” basis.

The advantage of the “spoke” route is that it holds, to a minimum, the number of miles a pupil must ride on the bus. On a pure “spoke” route, a pupil will not ride on the bus a greater distance than the distance from the pupil’s home to the school. The “spoke” route is the most economical if the driver of the bus lives in the vicinity of the first pupil pick-up and works in or near the school during the day.

In certain situations, it may be efficient to use “circular” or “loop” routes. With this type of route, the first passenger who boards the bus in the morning should be the first one to disembark in the evening.

In other situations, a combination of the “spoke” and “loop” routes may be the most efficient type. These are sometimes referred to as “button-hook” routes. The route starts at the school as a “spoke” type but then changes into a “loop” after a distance.

Short distances often permit one bus to transport more than one load of pupils. This “double-routing” or multiple load service, however, requires careful planning including school scheduling.

Emergency procedures should be established for each “regular” route and a copy of the route should be given to the parents before the school term begins. When weather or road conditions dictate that it is not safe to travel roads, an announcement should be made by radio or other means that the “emergency” route will be used on that particular day or days. The parents must then arrange to have their children meet the bus at a designated point.

Routes should be arranged so pupils need not cross a heavily traveled road to either board the bus or depart the bus. (Note: No driver shall stop a school bus and allow it to remain standing for the purpose of receiving passengers from or discharging passengers to the opposite side of the road on a multi-lane highway of four (4) or more lanes; provided, that this provision does not prohibit the discharging of passengers who desire to cross the highway at marked pedestrian crossings after the bus has proceeded (KRS 189.375).

The size of buses contemplated should be governed by road conditions and the density of pupil population. If the time required to traverse the route is within reasonable limits, the number of pupils on the route is sufficient, and the road surface is adequate, a sixty-five (65) or larger passenger bus is warranted. The larger bus will, if fully utilized, result in a lower per pupil cost.

Bus stops may not be located at intersections.

Maximum riding time for any pupil should be kept within reasonable limits and the age of the child should be given consideration.

Routes should be established so that they will diminish the necessity for school buses to traverse rail grade crossings at unprotected points or where the visibility is obstructed.

Bus stops may not be located at points where reasonable clear visibility in each direction is not sufficient to give the motorist adequate time to stop. The distance will vary in terms of traffic speed at the pick-up point involved. KRS 189.375.

A sufficient number of buses should be provided to transport all pupils without requiring groups of pupils to wait an unreasonable amount of time.

Attention should be given to items permitted in a student’s lap while being transported to guard against interfering with the compartmentalization and collision protection afforded by school bus seat design. Historically, Kentucky school districts have been advised by the Kentucky Department of

Education, Pupil Transportation Branch, that only those items that a student can carry safely in their lap may be transported on a school bus.

Consideration for economy should be limited only by requirements for safety and reasonable efficient and convenient service to the pupils to be transported.

Once routes have been tentatively designed using a map, the school transportation director/supervisor or designee should conduct a review, so that they may observe any factors, which might indicate a route change. Driver Training Instructors should inspect all bus routes and make recommendations to the transportation director/supervisor. That is, make sure that necessary “turnarounds” are safe and suitable in all weather conditions and that bus stop locations meet the reasonable clear visibility requirements. After this survey, a time study should be made for each route by driving it in the same equipment that will be used in the actual operation. The driver(s) who will operate over the route should regard the trip as a “dry run.” All scheduled stops should be made, mileage with and without pupils should be recorded, distance and time between stops should be indicated, etc. This data, if obtained accurately, will permit the development of a schedule, which probably will need little revision once it is placed into effect. The schedule as finally established should allow the driver enough time to operate in a safe manner. Allowance should be made for inclement weather conditions.

Route Service

In addition to laying out the routes, consideration should be given to the several methods of serving the routes. The plans for serving the routes will determine the number of buses and drivers required as well as the quality of the service. Following are the three (3) principal types of trips:

The single route trip involves a morning and afternoon trip by one bus on each route. This type adapts well to sparsely populated areas. It also meets the needs of schools where the instructional program requires both elementary and secondary pupils to arrive at the same time. The single trip plan requires a maximum number of buses and drivers because each route is covered only once and each bus serves only one route.

The double route trip calls for each bus to cover two (2) or more different routes morning and afternoon carrying children of all grades on each trip. This plan is suited to districts of dense population where distances are not great. Under this plan, however, program adjustments in the instructional schedule are necessary to avoid idle waiting time at the school.

The dual trip plan, also known as dual routing, calls for two (2) or more morning trips and two (2) or more afternoon trips over the same route by each bus. This arrangement is only practical where the route distances are short. High school pupils may be brought to school on the first morning trip with elementary children arriving on the second trip. If it is desired that the elementary day be shorter than the high school day, the elementary children may be scheduled to leave on the first trip in the afternoon. Districts whose program requires a day of equal length for both groups may transport the high school pupils on the first trip in the morning and return them on the first trip in the afternoon.

Either the double route or dual trip plan may reduce the number of buses and drivers needed to meet the transportation requirements. This could represent a substantial savings in the cost of transportation; however, it should be emphasized that where routes are necessarily long, it is not feasible to use double routes or dual trips. The requirements of the instructional program must in no way be neglected simply to accommodate double routes or dual trips.

Feeder Routes

After locations have been determined, it might be discovered that several of the routes show spurs on side roads of one (1) mile or more in length which serve several pupils whose homes are on the side roads. Small units could be used to transport pupils living on side roads to meet the large bus on its main route, eliminating these extra miles and saving some time for the large bus. These small units must comply with state regulations for vehicles designed to carry less than nine (9) passengers. The use of feeder units will permit a more complete application of the “spoke” route principle. Remember: All students being transported must receive the maximum amount of safety.

Loading and Unloading

Continuous supervision of the bus rider is a responsibility of the school so an adequate number of the teaching staff should be on duty when loading or unloading at schools. Hazards from other vehicles will be largely avoided by discharging pupils on the building side of the loading area at school. The unloading itself should be accomplished in an orderly manner without crowding or pushing.

It is recommended that a staff member be assigned to meet the buses with the main function being supervision of the children on the way from the buses to the school building. At dismissal time, the buses should be stationed at definite assigned points in the loading area prior to the dismissal bell. The loading area is a point of considerable pupil congestion at dismissal time, so adequate supervision shall be provided to ensure order and safety of the loading operation. Car and bus traffic should be separated.

Spare Buses

A spare bus is one that is in excess of the number assigned to regular bus routes. Spare buses may contribute to operational efficiency in several ways. Transportation for co-curricular or extra-curricular trips is made available without any disruption to regular schedules. A spare bus may also be used to replace a regular bus during planned maintenance work. Another use of the spare bus is a replacement in case of emergency due to mechanical failure or a bus being damaged in an incident.

There is no established “rule of thumb” for the number of spare buses needed per fleet. This would depend on the local situation, the adequacy of the maintenance facilities, the availability of parts distributors, the promptness of the service provided by the parts companies, and the number of co-curricular and extra-curricular trips permitted by the administration.

PLANNING SCHOOL SITES FOR SCHOOL BUS SAFETY

In the selection of school sites, major consideration should be given to the safety of pupils riding school buses. These vehicles will be forced to utilize the roads in and around the school site, plus public highways leading into the school area. High-density traffic flow near school exits and entrances due to the proximity of highways, periodic commercial traffic or massive commuter traffic from industrial plants should be avoided. It must be recognized that the area designated for the school site has been selected, in many cases, prior to the hiring of an architect. It is suggested, therefore, that this material be issued to Boards of Education and municipal planning authorities alerting them to the dangers inherent with the process of site selection. It is also suggested that Boards of Education discuss the selection with the Commissioner of Education, traffic engineers, the Kentucky Department of Education, Division of Facilities Management, and solicit their help in evaluating possible school sites.

All school bus traffic should be one-way traffic with the service door side of the bus always next to the loading and unloading zone.

Separation shall be maintained between bus traffic and other traffic flow as constituted by parent, pupil, service and administrative staff.

Students, administration and parent parking should be separate from the loading zone utilized by the school buses.

In the construction of parking areas (student parking, employee parking and visitor parking) it is important that these areas be separated from the bus loading area and bus travel lanes. Care should be exercised in the placement of these parking areas to preclude the visitors from crossing the school bus traffic pattern.

In the construction of sidewalks for students walking to school, consideration should be given for the elimination of crosswalks in front of buses.

All roads entering the school site should be graded to avoid dips and hollows that would impair the vision of motorists using the roadways. All roads should be designed for maximum visibility.

In the planning of a school and the location of roads, conditions should never be set up that would require school buses to be backed on the school property.

All pupil loading and unloading areas should be provided for within the school site.

In the provision of loading facilities, consideration should be given to separate areas especially designed for handicapped students including entrance ramps and handrails.

In the planning of all road and loading areas, architects should take into consideration emergency vehicles, which must have access to the school at all times.

Care should be taken in the planting of trees and shrubbery on the school site so as not to obstruct the vision of motorists.

Where necessary, traffic control devices should be provided to assist school traffic in entering or exiting the regular traffic flow.

CO-CURRICULAR AND EXTRA-CURRICULAR TRIPS

Co-curricular and extra-curricular are a special time for all concerned. They should also be a safe time. Pre-planning is a must to ensure a safe enjoyable trip. The local Board must adopt detailed policies and procedures outlining areas of responsibility for drivers, group sponsors, teachers, and chaperones. Many things could go wrong while on any trip. Being in unfamiliar areas makes for more difficulty in getting assistance. Drivers should have the necessary phone numbers to get in touch with supervisory personnel at any hour. School buses and drivers used for co-curricular and extra-curricular trips shall meet the same standards as those used to transport students to and from school. If a certified common

carrier is used for a field trip the local Board must approve the use of such for each trip. 702 KAR 5:060, Section 6 (2).

702 KAR 5:060, BUSES, SPECIFICATIONS AND PURCHASES:

Section 6.

1. No vehicle which was designed by the manufacturer to carry more than nine (9) passengers in addition to the driver shall be used to transport children to or from school or events related to such schools that does not meet Kentucky Minimum Specifications for School Buses; Revised, that were in effect on the date of manufacture, or does not meet Federal Motor Vehicle Safety Standards applicable to manufacturers of school buses, except as provided in Subsection (2) of this section.
2. School districts may, at their reasonable discretion and with due regard to the safety and required supervision of the school children to be transported, utilize appropriately certified common carriers, in regular or charter service, to transport school children to or from school-related events, as long as the vehicles so utilized are not significantly used as school buses. Such use of common carrier service, in lieu of qualifying school buses, shall be on a case-by-case basis, and the reasons believed by the board to justify such shall be cited in the Board minutes.

In developing policy for the utilization of school buses while on co-curricular and extra-curricular trips, the local Board of Education must develop policies and procedures to provide for the safest possible transportation of pupils to school related events. Local Boards must keep in mind their responsibility for the safety and well-being for their students while these students are on co-curricular and extra-curricular trips.

Local Boards of Education must keep in mind that the statutes and administrative regulations of the Kentucky Board of Education, which apply to the bus trip to and from school, also apply to school related events. In developing local policy for extra-curricular and field trips, local Boards of Education must NOT approve any policy which would require local pupil transportation personnel and school bus drivers to violate or disobey any law or regulation.

PER 702 KAR 5:080 SECTION 14 SUBSECTION 3 A DRIVER SHALL NOT PERMIT THE TRANSPORTATION OF ANY OBJECT THAT WOULD BLOCK THE BUS AISLE OR EXITS. THIS IS A LEGAL BINDING REQUIREMENT ON THE DRIVER WHEN THEY ARE TRANSPORTING CHILDREN TO AND FROM SCHOOL AS WELL AS WHEN TRANSPORTING STUDENTS ON CO-CURRICULAR AND EXTRA-CURRICULAR TRIPS.

PER 702 KAR 5:080 SECTION 21 (1) A SCHOOL BUS DRIVER SHALL NOT OPERATE THE SCHOOL BUS AT A SPEED IN EXCESS OF THE POSTED SPEED LIMIT ON ANY SECTION OF HIGHWAYS OVER WHICH THE BUS TRAVELS. (2) A DRIVER SHALL NOT DRIVE THE SCHOOL BUS ON ANY ROADWAY AT ANY TIME AT A SPEED WHERE THE CONDITIONS OF THE ROADWAY, WEATHER CONDITIONS, OR OTHER EXTENUATING CIRCUMSTANCES WOULD LIKELY MAKE IT UNSAFE

There is a difference between overloaded and overcrowded. A bus is overloaded when the number of persons on the bus exceeds the rated capacity of the bus. A bus is overcrowded when the number and size of the passengers cause the bus aisles and emergency exits to be blocked by any means or any student is not afforded a forward-facing seated position. A bus is not to be overcrowded with passengers and no large objects are to be transported.

When developing policy on the numbers that may be transported on one bus during extra-curricular, field, and athletic trips the following should be considered:

The capacity of bus seating is based on a thirty-nine (39”) inch seat. The standard allows what is termed thirteen (13”) inches of “rump room” per person. There are two (2) thirty-nine (39”) inch seats with one on each side of the bus with a twelve (12”) inch aisle per row. When you put middle school and high school age children in these bus seats, many require more than the allotted thirteen (13”) inches. The extending of passengers out into the aisle in many instances blocks the aisle. When this happens, the driver is in violation of 702 KAR 5:080 that requires aisles to not be blocked.

School transportation personnel (Superintendents, Directors, drivers, riders, etc.) have a responsibility to ensure school buses are not loaded beyond the designed load criteria nor utilized to transport students and/or items in any manner that would negate the intended design and use.

When utilizing a school bus to transport pupils on co-curricular and extra-curricular, field or athletic trips, the age and size of the pupil should be taken into consideration when establishing policy on the loading of the school bus. Taking into consideration the space available and the regulations that require the aisle and exits to not be blocked. The local Board of Education should have a policy that limits the number of middle and high school students on a bus, which is on a special trip outside the school district to no more than two (2) per seat.

Emergency evacuation of the school bus must receive added emphasis especially when utilizing the school bus for special trips (co-curricular and extra-curricular). School districts are required to ensure that all students riding a school bus receive training on how to safely ride and emergency evacuation of a school bus prior to being transported on any co-curricular or extra-curricular trip. In many cases, all children who are on co-curricular and extra-curricular do not ride a school bus to school each day and might not have been included in the regular required evacuation drills.

As a minimum, the local policy for utilization of buses on special trips (co-curricular and extra-curricular) should cover the number to be transported, methods of transporting equipment and other items on the bus, emergency evacuation procedures and measures to ensure that those near emergency exits understand their responsibilities in the event of an emergency.

A number of different types or groups participate in co-curricular or extra-curricular trips. Typical groups and group leaders would include:

1. Team/Coach
2. Class/Teacher
3. Group/Chaperone

On group trips, responsibilities are shared between the driver and the group leader, teacher and/or chaperone. KRS 161.185 requires a member of the school faculty or a member of the administrative staff accompany students on all school sponsored or school endorsed trips. A non-faculty coach or assistant may be permitted on school sponsored or school endorsed athletic trips (KRS 156.070 (2)). Principals, teachers, coaches, band directors and other school personnel who request and take special trips should be riding on the school bus and not in cars following the buses. Parents can be used to assist school employees on trips but should not be used in lieu of school employees.

Responsibility of the driver:

1. Obey all safety regulations and laws. The school bus driver shall not operate the school bus at a speed in excess of the posted limit on the sections of highways over which the bus travels. The driver shall not drive the school bus on any roadway, at any time, at a speed where the conditions of the roadway, weather conditions or other extenuating circumstances would likely make it unsafe.
2. Maintaining passenger control. Review with passengers the procedures for emergency evacuation and conduct drills for all passengers.

3. Control of emergency situations.
4. Maintaining safe vehicle condition.
5. Selecting:
 - a. Rest Stops
 - b. Food Stops
 - c. Fuel Stops

Responsibilities of group leaders and/or teachers:

1. Relaying trip plans and safety precautions.
2. Providing passenger information, (i.e., list of passengers and any unusual medical history, etc.).
3. Maintaining passenger control.
4. Supervision at all stops.
5. Co-curricular or extra-curricular activity.
6. Head counts.
7. Passenger's instructions.
8. Assembly of students.

Responsibilities of Transportation Director/Supervisor:

1. Vehicle and driver selection and availability.
2. Providing necessary time for planning.
3. Knowing where to communicate with the driver in the event of an emergency.
4. Determining whether road conditions are such that it would be safe to travel.

CONDUCTING EMERGENCY EVACUATION DRILLS

702 KAR 5:030 Pupil Transportation's Responsibilities

Section 14. A district shall develop a plan providing all pupils instruction in school bus pupil safety each school year. The district shall conduct two (2) evacuations each semester with the first evacuation each semester being conducted within the first week in accordance with the Driver Trainer

Instruction Manual, Chapter Eleven (11). The district shall retain documentation of emergency evacuation performance. THE GOAL SHOULD BE TO EVACUATE ANY BUS WITHIN THE LOCAL DISTRICT IN LESS THAN TWO (2) MINUTES. THE LOCAL SCHOOLS SHOULD ALSO CONDUCT VERY COMPREHENSIVE DRILLS WITH SPECIAL NEEDS STUDENTS.

The following suggestions have been prepared to help districts conduct emergency evacuation drills in the safest possible manner. Modifications may be necessary based upon each school system's policies/procedures and the circumstances and conditions that are likely to arise in each locality. Local Board and school systems should give very serious consideration to conducting school bus emergency evacuation drills in conjunction with local law enforcement agencies, Disaster Emergency Service, Red Cross and other agencies and/or groups that respond to emergency situations.

Planning the Drill

1. All drills should be planned in advance with the school administration. The age levels of the pupils should be considered in the planning. It is a good idea to have the school nurse present during the drill.
2. There should be a briefing session with the driver and driver assistant before the drills. Go over the drill procedures and make sure they understand what to do.
3. All pupils should be carefully informed about the drill. Never have a surprise school bus evacuation drill. Pupils should be instructed that during the drill or in a real emergency they should do the following:
 - a. Remember the driver is in charge and listen to his/her instructions.
 - b. Stay in your seats until the driver or driver assistant gives the order to evacuate.
 - c. Take your time, but go quickly.
 - d. Do not shove or push, take your time. Crowding will delay everyone.
 - e. Be quiet and orderly.
 - f. If you use the emergency door, duck your head as you go out.
 - g. Wrap loose clothing...(i.e., coat edges, shirt tails)...around you as you go out. You do not want to get your clothing caught in the door.
 - h. Keep your hands free. Leave everything behind except coats in cold weather. Do not take time to gather books, lunch boxes, etc. Your life is more important.
 - i. If you have to jump, bend your knees to break the shock as you land.

- j. Get away from the exit as quickly as possible so others can get out.
 - k. Gather in a group at least one hundred (100) feet from the bus, off the road.
 - l. Be reassuring. Prevent panic.
4. Drills should be conducted on the school grounds if possible with the principal present to observe.
 5. Before the drill, pupils should be instructed how to open the emergency door and where to assemble after leaving the bus.
 6. Written documentation of each drill must be kept. As a minimum, the names of pupils in each evacuation should be recorded along with the grade level of those involved. All evacuations should be timed and the time recorded on the evaluation checklist. Records of each evacuation of each bus must be kept on file so that a record of when, where, how, who and problems encountered will be available for interested parties to inspect. A completed written report must be kept and filed on each group that participates in an emergency evacuation of a school bus. Verification of the compliance with the emergency evacuation requirements is mandatory.

Conducting The Drill

1. Four (4) methods of evacuation should be reviewed and practiced prior to conducting the drill: (Plan for evacuation shall be formulated by the Kentucky Department of Education).
 - a. Everyone exits through the entrance door.
 - b. Everyone exits through the rear emergency door.
 - c. Everyone exits through the left side emergency door.
 - d. A combination of all doors.
2. At the beginning of each drill plan, one (1) helper should go out each exit door being used. The helper(s) should help the passengers leave the bus by offering an extended hand. When the rear emergency door is used, the second pupil through the door should hold the door open if the bus is not equipped with an automatic hold open device.
3. Extra care should be given to small children while exiting through the emergency door. They can lower themselves to a sitting position with feet outside the door, then, drop to the ground. A gym mat may be placed beneath the door during the drill.
4. Pupils should take care not to bump their head as they exit through the rear or side emergency door. The door is normally forty-eight (48") inches high.
5. The driver or one (1) helper should assist within the bus to keep order and to prevent panic. They should make sure everyone is off the bus and should be the last to leave.

6. After leaving the bus, the pupils should go to a designated safe place, (at least 100 feet away from the bus), away from the scene.
7. Every step of an evacuation should be carried out, including placing the reflectors at the proper distance from the bus. Arrangements must be made in advance for students who may need extra assistance during evacuation drills. Since the driver is an active participant in the drill, the principal or transportation department personnel should observe the drill and time the drills. This individual would be the one to complete the report required on each drill. After the drill, the effectiveness of the drill can be determined and improvements made.

CHAPTER 3

SELECTION AND TRAINING OF SCHOOL BUS DRIVERS

The employment of careful, well-qualified bus drivers is a most essential phase of a safe school pupil transportation program. Driver selection should have only one basic criterion – the employment of the most responsible and careful operator that can be found. It must be recognized that school bus driving is generally a part-time job and that the school district cannot afford to pay a full-time salary for a part-time job. A careful survey should be made of those persons in the community who can arrange their work so that they can devote the time required for bus driving.

702 KAR 5:080 Bus Drivers' Qualifications; Responsibilities is located in Kentucky Administrative Regulations.

SELECTION

The selection of school bus drivers is the responsibility of local school officials. All drivers must meet established standards for employment as a school bus driver. KRS 161.011 states that “No person who is initially hired after July 13, 1990, shall be eligible to hold the position of a classified employee or receive salary for services rendered in such position, unless he holds at least a high school diploma or high school certificate of completion or GED certificate, or he shows progress toward obtaining a GED. To show progress toward obtaining a GED, a person shall be enrolled in a GED program and be progressing satisfactorily through the program, as defined by administrative regulations promulgated by the commissioner of the Department for Adult Education and Literacy”. Possible sources from which drivers can be recruited are:

1. Housewives
2. Ministers
3. Part-time employees
4. Custodians
5. Farmers
6. College Students

In addition to the requirements for bus drivers specified by law and regulations, the school authorities shall adopt standards as to character, emotional stability, knowledge, and skill requirements.

Among the elements that should be considered in setting up character standards are reliability or dependability; initiative; self reliance and leadership; ability to get along with others; freedom from use of undesirable language; personal habits of cleanliness; moral conduct; honesty; freedom from addiction to narcotics or habit forming drugs and freedom from addiction to alcoholic beverages or liquors.

In recognition of the importance of emotional stability needed in school bus driving, local school officials, in selecting applicants and in re-employing drivers, should give full consideration to such factors as patience, even temperament and calmness under stress.

All applicants interested in driving a school bus should indicate that they have a satisfactory knowledge of state and local motor vehicle regulations; traffic laws and ordinances; traffic signs; signal and road markings and driving techniques including knowledge of the effects of physical laws on vehicle control. They should also be required to show satisfactory proficiency in the skills necessary with all phases of school bus operation.

Local school authorities shall check the driving history of all persons who apply for a position as school bus drivers. The driver's word should not be accepted as final on this point, but information on traffic violations must be secured from the Driver Licensing Division. A criminal records check is also required prior to initial employment.

Tips For The Recruitment And Retention Of School Bus Drivers

Recruitment

1. Advertise via local newspapers, direct mailings, flyers, community functions. Have sign-up booths at preschool/kindergarten sign-up areas, civic church organizations, shopping malls, county fairs, etc.
2. Send job listings home with students.
3. Recruit parents of kindergarten students on the first day of school.
4. Solicit fast food chains for part-time work for drivers between runs.
5. Recruit college students in college towns.
6. Recruit early retirees from local Association of Retirees Group.
7. Provide a package that will pay for physicals, pre-employment expenses and training (including testing and licensing of the commercial driver's license). Have drivers sign an agreement to work for at least one year after being trained and certified. If they leave, they must repay the district for their training expenses.

8. Recruit fire and police personnel.
9. Place job listings at adult vocational school.
10. Place advertisements on school menus that are sent home with students.

Retention

1. Allow drivers to be able to work four (4) hours per day to be eligible for benefits.
2. Provide an equitable salary range.
3. Develop a driver appreciation program (annual, biannual, around holidays and especially for School Bus Safety Week).
4. Recognize those drivers who have not been involved in any at-fault incidents.
5. Recognize birthdays and/or "Driver of the Month."
6. Become actively involved by developing and/or participating in a school bus safety Road-E-O.
7. Support your drivers when they experience student discipline problems.
8. Provide pay raises by increment based on year's experience.
9. Consider substitutes to be permanent employees.
10. Consider inter-local agreements between school districts (share substitutes).
11. Make drivers feel that they are part of a family.
12. Have a list of rules and regulations sent home to parents for their signatures. Their children will not ride the bus until the signed form is returned. Students in the seventh grade and above must also sign the form themselves.
13. Train drivers in de-escalation or conflict resolution.
14. Always be positive and supportive.

TRAINING

Following the selection, each school bus driver must be adequately trained. Skill, proper attitude, and knowledge necessary for safe driving and handling of pupils must be developed through the driver-training program. The program must provide for the development of driver skills to a high level of performance. Proper supervision should further refine and improve such skills. (See attached check list to be used when evaluating drivers.) A pre-employment road test should help in the selection process.

Each new driver, regardless of previous training or experience must successfully complete the Kentucky School Bus Driver Training Curriculum and be trained to drive a Kentucky school bus by the local state certified driver-training instructor.

Certification is based upon completion of the training curriculum, which is taught at the local district level by a certified School Bus Driver Training Instructor. Certification is granted by the Kentucky Department of Education.

PERSONAL HABITS

Drivers found drinking alcoholic beverages while on the job, or who appear on the job under the influence of alcoholic beverages, will not be allowed to continue their duties until it has been determined if they have, in fact, been drinking. Drivers who allow drinking habits to affect their driving efficiency will be dismissed.

Drivers are expected to have a neat and clean personal appearance on the job.

Male drivers are expected to keep hair, sideburns and mustaches neat and well groomed.

Female drivers are expected to keep their hair well groomed – no curlers.

Drivers are expected to refrain from the use of foul language in the presence of pupils at all times.

Drivers are expected to refrain from discussing other driver's habits in the presence of pupils.

Drivers are not to use tobacco products at any time on the bus.

Drivers are expected to refrain from taking part in "Neighborhood Discussions" with pupils.

Drivers are expected to support the policies of the Board and help promote the progress of the school system.

Beginning school bus drivers shall be required to have completed the school bus driver-training curriculum prior to employment. The specific approved driver training curriculum is as follows:

APPROVED DRIVER PROGRAM

CLASSROOM INSTRUCTION

- A. Laws and Regulations – two (2) hours
- B. Driving Fundamentals – two (2) hours

- C. Care and Maintenance – two (2) hours
- D. Critical Situations - one (1) hour
- E. Incidents and Emergency Procedures – two (2) hours
- F. Pupil Management – two (2) hours
- G. First Aid - one (1) hour
- H. Special Needs Transportation – one (1) hour
- I. Extra-Curricular Trips – one (1) hour

VEHICLE OPERATIONS (THREE HOURS)

Beginning drivers shall demonstrate driving skills and a score sheet shall become a part of the driver's record. Vehicle knowledge will include a successful pre-trip inspection. Driver applicants will demonstrate the ability to perform steering, shifting, maneuvering, braking and use of mirrors on a school bus prior to being enrolled in the training program.

VEHICLE CONTROL AT SPEED (ONE HOUR)

The driver will successfully perform a ninety (90) degree right-hand turn at speed and ninety (90) degree left-hand turn at speed. Applicants must perform a straight-line drill showing skills in holding the bus steady and driving through diminishing clearances. Irregular surface maneuverability is required to demonstrate the ability to safely recover from dropping bus wheels off the pavement without jeopardizing on-coming traffic by staying in the proper lane. A backing drill, using mirrors, is scored and a stopping drill showing spatial awareness is required.

BUS ROUTE IDENTIFICATION (TWO HOURS)

Drivers must drive the school bus route under the supervision of a certified school bus driver-training instructor (empty bus). Instruction and training shall be provided to reduce hazards and increase defensive driving techniques.

The driver will locate the school; identify traffic patterns, ingress/egress zones, merging areas and traffic signals. Student loading zones, student pickup areas and fueling and maintenance stops are identified.

Instruction and identification of potential hazards to include blind curves, hilltops, foggy or slick areas, high-density traffic and congested pedestrian areas are included.

DRIVER REVIEW AND INSTRUCTION (FIVE HOURS)

Driver Review I, Evaluation and Instruction (Two Hours) - within first five (5) days of driving, Driver Review II, Evaluation and Instruction (Two Hours) - not less than twenty (20) nor more than thirty (30) days after Driver Review I and Driver Review III, Evaluation and Instruction (one hour) – within 3to 6 months of completion of Driver Review II. Review III shall be done with students on the bus.

All drivers shall drive routes prior to transporting students.

Kentucky school bus drivers must pass a five (5) year driving history screening test and criminal record check prior to being enrolled in the training program.

CERTIFIED BUS DRIVER TRAINER PROGRAM

No person shall be certified to teach the school bus driver training curriculum until he or she has satisfactorily completed a minimum of thirty-three (33) hours classroom and driving instruction, conducted by the Kentucky Department of Education and relevant to the approved driver training curriculum, and has been issued an instructor’s certificate by the Commissioner of Education. Instructors shall be required to renew their certificates annually by completing six (6) appropriate hours of update training conducted by the Pupil Transportation Branch.

APPROVED INSTRUCTION PROGRAM

	Points
Written Examination.....	100
Personal Appearance and Interview Examination.....	50
Physical and Verbal Vehicle Inspection Test.....	50
Serpentine	35
Offset Alley	50
Student Loading.....	75
Railroad Crossing	60
Straight Line	50
Diminishing Clearance.....	50

Back-up.....	50
Right Turn.....	25
Stop Line.....	<u>15</u>
TOTAL	<u>610</u>

Beginning school bus drivers shall be required to demonstrate driving performance, complete all testing and interview events and attain a total composite score of 488 points (80% of 610 possible points).

PHYSICIAN'S CERTIFICATE

I hereby certify that _____ has been examined by me in accordance with the Kentucky Administrative Regulations concerning the physical fitness requirements for school bus drivers and in accordance with the particular items shown on Form TC94-35E **MEDICAL EXAMINATION REPORT FOR COMMERCIAL DRIVER FITNESS DETERMINATION**, which is on file in my office.

In my opinion, the above named person is physically and emotionally

QUALIFIED _____ DISQUALIFIED _____

to perform the duties of a school bus driver.

Qualified only while wearing glasses: Yes _____ No _____

Other _____ qualification _____ restrictions:

Physician's Signature M.D.

Date

Physician's Address

EXAMINING PHYSICIAN: Send this sheet to the Board of Education. This sheet will serve as the official record of your examination of the above named person.

KDE/DCC APPROVED 2300-080

KENTUCKY DEPARTMENT OF EDUCATION

SUPPLEMENT TO TC 94-35

School bus drivers must be tested for Tuberculosis upon initial employment.

Tuberculin Test required: Yes _____ No _____

Tuberculin:

Positive _____ (if positive) X-Ray Positive _____

Negative _____ Negative _____

COMMERCIAL DRIVERS LICENSE PROGRAM

Congress passed the Commercial Motor Vehicle Act on October 26, 1986. All states were required to implement their programs no later than April 1, 1992.

Kentucky State Law requires that all commercial drivers be properly licensed for classification of the vehicle that they are to drive. The Pupil Transportation Branch has developed a set of guidelines and procedures to expedite the process of obtaining the proper permits and licenses. Detailed training curriculum is contained in the School Bus Driver Instructors Manual.

The following is a brief description of the process.

A Kentucky school bus driver may walk in off the street and take the written test(s) provided they have the following materials in their possession:

1. Completed application-Form TC 94-32.
2. Employee/Applicant Certification-Form TC 94-36. The driver (applicant) fills out the first part and the employer fills out the second part.
3. A valid Kentucky operator's license.
4. D.O.T. medical card - small white wallet size card. In order to get this card, the doctor must fill out medical examination Form TC 94-35 E. The local school districts are responsible for the reproduction of Form TC 94-35 E, and the printing of the white wallet size cards.
5. Application and testing fee.

The applicant will then take a vision test and the three (3) required written tests. These tests are General Knowledge, Air Brakes, and Passenger Endorsement prior to November 1, 2006 or General Knowledge, Air Brakes, Passenger Endorsement, and School Bus Endorsement after October 31, 2006. Upon successful completion of these tests (80% on each) the applicant will be issued a permit and may then continue driving with their permit/license. When the applicants are ready to take the Skills Test, the applicant may contact the state certified third party examiner in their district to set

up an appointment to take their Skills Tests. Upon successful completion, the applicant should return to the Circuit Court Clerk's Office or License Testing Center to be issued their CDL.

The applicant must hold their permit a minimum of ten (10) days after they take the written exams before taking the skills test.

If a school district has a group of twenty (20) or more applicants to take the written tests, the examiners will come to the district for the administration of these tests.

At the present time, the status for those applicants who do not read or read with retention is: to take the written test, and if they fail then apply to the Circuit Court Clerk to take the verbal test. Some sites around the state will mechanically test these applicants.

If you have any questions about Commercial Driver Licensing, Please call the Division of Audit and Transportation Services, Transportation Services Branch at (502) 564-4718.

CHAPTER 4

PUPIL MANAGEMENT AND CONTROL

One area in pupil transportation that can cause very serious problems for the transportation supervisor, bus driver, and the school system, is student behavior. Not enough has been written about student control in the various publications, which are available to pupil transportation directors. It is probably the most complex and demanding phase of the pupil transportation system, as well as the hardest to satisfactorily handle. Student behavior on school buses will become a serious problem for bus drivers, Directors of Transportation, Superintendents and the school Board if not properly and timely corrected.

The best way to correct student behavior problems is to ensure that behavior problems do not arise. A clear and definite understanding of what is expected on the part of all parties concerned is vital. All rules and regulations concerning student behavior should be well known and clearly understood by (1) bus drivers; (2) students; (3) parents; (4) administrators and teachers; and (5) Board of Education members.

BOARD OF EDUCATIONS' RESPONSIBILITIES

The local Board of Education must set the tone for the safe transportation of children. Clear and concise policy statements must be made and adopted by the Board of Education. Board policy must cover the rules and regulations governing student conduct, spell out the responsibility of each individual concerned, and procedures for suspension of bus riding privileges.

In setting Board Policy it is important to cover all aspects of pupil management. Policy must cover:

1. Who is eligible for transportation.
2. Rules of conduct for pupils riding the bus (both regular runs and activity trips).

PRINCIPAL'S RESPONSIBILITY

In order for bus drivers to effectively perform their duties, the principal or person designated by the local Board of Education must assume the responsibility of enforcing rules

and regulations concerning transportation of pupils. 702 KAR 5:030 ensures that supervision and discipline of students takes place.

TEACHER'S RESPONSIBILITIES

702 KAR 5:030, Section 14 mandates that students be instructed in school safety at least annually and receive two (2) evacuation procedures each semester. (See Conducting Emergency Evacuation Drills - Chapter 2.) Teachers have a golden opportunity to reinforce safety instruction and material in the classroom. LESSONS can be geared around transportation according to grade level. Students can be asked to write compositions expressing feelings, reactions and concerns about transportation. Class discussions are beneficial. Tours of bus compounds may be available through the transportation director. Resource people could be used. Films are available from the Kentucky Department of Education. It just takes a little imagination and a great deal of effort. Teachers can do some seemingly small things that will help to prevent accidents.

1. Dismiss students on time. For students running to catch a bus, safety is probably the last thought on their mind.
2. Teachers should not expect students to carry bulky projects or instruments that might block aisles. Pets and animals, other than required service animals, shall not be carried on the bus.
3. Speak positively to students about transportation safety.
4. Teachers should have a good knowledge of local rules and regulations regarding transportation.
5. Strive to help administrative officials enforce rules regarding transportation.

STUDENT RESPONSIBILITIES

Students must bear their share of responsibility for safety while passengers on school buses. The privilege of any student to ride a school bus is conditioned upon their good behavior and observance of the rules and regulations set forth by the local Board of Education. Certain levels of conduct are expected of any and all students riding the bus. All students shall conduct themselves in a manner conducive to the safe transportation of all. No conduct will be tolerated that will in any way cause distraction of a driver's attention that might result in unsafe operation of the bus. Students are expected to respect the authority of the bus driver and obey his/her instructions. If the rules are followed, all concerned can expect to have a safe bus trip.

While Waiting To Board The Bus

1. Arrive at your assigned bus stop five (5) minutes ahead of the bus. The driver cannot wait for you.
2. Do not play in the path of traffic and stand well away from the road when the bus approaches.
3. Do not damage other people's property while waiting for the bus.
4. Avoid making excessive noise.
5. Fighting at bus stops and on the way to and from school is subject to local Board disciplinary action.
6. Never run alongside the bus when the bus is moving. Wait until the bus stops and the driver signals and then walk to the door and board the bus in an orderly manner. DO NOT PUSH OR SHOVE.

While Riding On The Bus

1. Obey the driver's instructions. The driver of a school bus is in complete charge of students while they are on the bus. Complaints regarding discipline on the bus should be taken to the principal.
2. The driver has the authority to assign seats.
3. Students shall remain properly seated while the bus is in motion.
4. Never extend arms, legs or head outside the bus.
5. Refrain from talking to the driver except in an emergency.
6. Pets and animals, other than required service animals, are not permitted on the bus at any time.
7. No one shall tamper with any equipment or operate any part of the bus.
8. Do not mar or deface the bus. Students caught damaging bus equipment will be subject to disciplinary action and/or restitution.
9. There is to be no fighting or profanity on the bus or any loud disturbances.
10. Students must not wave or shout at pedestrians or occupants of other vehicles. Do not throw objects from bus windows.
11. Do not throw waste paper or objects on the floor. Eating or drinking is not permitted.
12. Use of tobacco products or drugs is prohibited.

13. Students are required to ride their assigned bus, unless they have written approval from the principal or his/her designee.

PARENT'S RESPONSIBILITIES

Progress has been made in the improvement of safety and safety awareness in the transportation of students. However, one critical area that has not been explored to the fullest extent, is that of parents and guardians of the students. Safety awareness must begin and be consistently reinforced at home. The following points are suggested for parents:

1. Familiarize themselves with local school and Board of Education policies and procedures pertaining to riding a bus. Know their child's bus number.
2. Parents should try to establish the exact time their child should be at the bus stop in the morning. They should also recognize the dangers of students playing at the edge of a busy roadway.
3. Warn their children of the dangers of strangers who appear friendly and hang around bus stops.
4. Bad weather is the most likely cause for bus delays. Dress children properly for bad weather. Warn children that motorists will have more difficulty seeing them in bad weather, thus more caution is necessary.
5. Provide their child with a school bag to carry all their school supplies. Loose papers are a serious hazard.
6. Stress the importance of remaining properly seated and reasonably quiet while aboard the bus.
7. Familiarize them with emergency procedures and danger zones around the bus and suggest they discuss these zones with their children.
8. Make sure children know their names, addresses and phone numbers.
9. Parents should explain to their child that situations aboard the bus may not always be familiar. The bus might have to take an alternative route, a substitute may be driving the bus, or occasionally another bus might be used. If the child is confused, they need to be encouraged, it is O.K. to ask the driver questions.
10. Parents should also support local Board policies.
11. Check for baggy clothing, drawstrings, backpack straps and any other object that could become entangled in the school bus handrail or service door area.

SCHOOL BUS DRIVER'S RESPONSIBILITIES

The conduct of students on a bus has a direct relationship to their safety. The position should be taken that no act or conduct that distracts the driver from safely maneuvering the school bus through traffic and operating the bus safely will be condoned or tolerated. Swift and firm action must be taken by the driver to solve and correct these problems.

One of the first steps a school bus driver can take toward controlling student behavior is to set a proper example. The driver should always practice good driving habits, take a personal interest in the job, keep abreast of all advancements that take place in pupil transportation and take excellent care of the equipment.

Secondly, the attitude toward the job and toward the students is critical. The driver must realize that it is more important to be “respected” by the students than to be “liked” by them. Students can accept and will conform to rules and regulations, which are fairly, firmly and consistently enforced. Letting some students get away with breaking the rules in order to be nice so that they will like you is a sure way for the school bus driver to have trouble! This tactic will result in students losing respect for the driver.

Most of the general public and, to a degree, school bus drivers feel that a school bus driver needs only to be trained to drive the bus safely. There is much more to the job as a school bus driver than that. A school bus driver may be the best defensive driver on the road. They may understand and obey all traffic laws. They may attend all training sessions available. They may be a model employee. They may keep their bus in excellent condition - BUT, if they refuse to get out of the driver's seat and get involved in solving the behavior problems on their bus, they are less than a professional school bus driver.

The word “involved” is a key word in the training of good school bus drivers. What the driver learns during the training sessions is of little value unless the driver is willing to come to grips with each problem as it arises. Continued neglect of the problems of profanity, heads out of windows, an older student slapping a younger student and the smell of cigarette smoke and many others will cause these problems to grow until they become a major crisis. Parents and the general public are greatly concerned for the safety of their children.

Prompt attention to the small problems in a fair, firm and consistent manner will keep them from becoming a major concern.

How do we get drivers to be involved?

First, the driver must have a clear and concise understanding as to their responsibility to the school district, students and their parents. Second, the driver must be taught the procedures to be used in carrying out the driver's responsibilities. This will be of little value, however, if the drivers lack the motivation to use what they have learned.

There are several methods that can be used to motivate people. First is by example. Those in management must show enthusiasm and purpose in what they are doing. The driver needs to apply this in their relationship with the students. If the driver is untidy, dirty and ill-tempered, then he/she sets a poor example, which most assuredly will be reflected in the conduct of the students who ride his/her bus.

Second, is pride in doing a good job. Management must establish goals and standards to be met to instill pride in accomplishing these goals. Recognition for a job well done is vital. Make the drivers feel they have done well and are considered professionals.

Third is the fact that enforced motivation is less desirable, but usually very effective and is to be used when all other methods fail. It is simply laying it on the line to the school bus driver that the disciplinary action will be taken if the problem is not corrected. Responsible supervision and leadership along with a good training program creates an atmosphere leading to driver motivation.

A school bus driver's ability to control students is closely related to the image the driver presents, not only to the students but also to the community as a whole. Parental confidence in the transportation program and the school bus driver is greatly influenced by the image the driver projects.

Being a good safe driver who uses good judgment in handling problems in a fair, firm and consistent manner and giving equal treatment to all helps keep the bus on schedule and will project a very positive image.

Characteristics that drivers should realize about individual student behavior that will help them understand student problems, moods and individual differences are:

1. Students generally would like to be older than they are and free of adult control.
2. Students like to be recognized for favorable traits or abilities.
3. To be recognized, students will sometimes cause problems.
4. Being singled out before a group or loaded bus, for disciplinary reasons is disliked by students. It is a very poor form of discipline and will cause more trouble.
5. Students like to be considered as equals by adults. Some positive discipline procedures for drivers to use in maintaining a consistent, well disciplined bus are:
 - a. Knowledge of district procedures for discipline problems is a must. Also, drivers must consistently follow these procedures.
 - b. Have a good working relationship with students.
 - c. The driver who can inform parents of discipline problems with diplomacy can solve problems through this procedure.
 - d. Keep school officials aware of discipline problems, offer suggestions for improving discipline and also being willing to accept suggestions from officials.
 - e. A list of students who ride each bus should be maintained.
 - f. Know the students - a good driver knows the names of all their students.

25 Suggestions For Improving The Driver's Image And Make Student Management Easier

1. Never give an order you do not mean to enforce.
2. The response of the child is an action. Give your command to stimulate action, not check it. Say "Do this," rather than "Don't do that." Suggest an action, which can successfully be obeyed.
3. Give a child time for reaction.
4. Have a reason for what you ask a child to do, and when possible, take time to give the reason – they will see the point if you can.
5. Be honest in what you say and do. A child's faith in you is a great help.
6. Be fair. It isn't punishment, but injustice that makes a child rebel against you.
7. Be friendly. Always show an interest in what they are doing.
8. Commend good qualities and actions.
9. Try to be constructive, not repressive, in all dealings with children.

10. Remember that a sense of humor is extremely valuable.
11. Never strike a child.
12. Do not judge misconduct by how annoying it is to you.
13. Never take your personal feelings and prejudices out on the children.
14. Maintain poise at all times. Keep your temper in check.
15. Remember - "The tongue is the only keen-edged tool which grows sharper with constant use."
16. Look for the good qualities. Every child has them.
17. Do not "pick" on every little thing a child does. Sometimes it is wiser to overlook some things.
18. Bear in mind that misbehavior is seldom willful. There usually is cause and it may be in yourself or some other influence outside the child.
19. Listen for suggestions and complaints from each of the children.
20. Be fair, firm and consistent in all that you do.
21. Always set a good example.
22. Intelligence in handling youth consists of thinking faster than they do. If they can out-think you, you are not using your maturity. You should see possibilities coming before they happen. This is the secret of good leadership.
23. Defiance to established procedure comes from failure in some adults to keep the situation in hand. If there is a danger of a direct break, the child should not be forced. An adult's will, should never be pitted against that of a child. It is far wiser to give some simple direction that will be mechanically obeyed and pick up the reins of control in a quiet way.
24. Never hold a child up to public ridicule. A sure way of creating a discipline problem.

CHAPTER 5

TRANSPORTATION OF SPECIAL NEEDS PUPILS

Transportation of special needs students poses an entirely different set of concerns for pupil transportation personnel. Pupil transportation personnel are vital to the educational programs available for special needs children. The pupil transportation supervisor must be involved from the beginning in determining the needs and methods to be used when transportation is to be provided for special needs students. Transportation of special needs students may or may not require specialized equipment.

It is very important that pupil transportation personnel be made aware of the requirements imposed by law in regard to providing the related service of transportation.

SECTION 504 OF P.L. 93-112 AND P.L. 94-142

The two (2) laws that govern the education and training of special needs students.

Section 504 states: “No otherwise qualified special needs individual in the United States...shall solely by reason of his need, be excluded from participation in, be denied the benefits of, or be subjected to discrimination under any program or activity receiving Federal financial assistance.”

According to Section 504 regulations, “free” education means the provision of education and related services without cost to special needs persons or guardians, except where such costs are imposed on all others.

94-142 states: “The Education of all Handicapped Children Act, signed into law in 1975, is unique in several of its provisions. It requires development of an Individualized Education Program (IEP) for each handicapped student and requires that each person involved in any aspect of a special needs child’s special education program be appropriately and adequately trained.” Special needs is defined in P.L. 94-142 as: “Specially designed instruction, at no cost to parents or guardians, to meet the unique needs of a special needs child, including classroom instruction, instruction in physical education, home instruction and instruction in hospitals and institutions.

P.L. 94-112

Requires that transportation be provided as a related service if a child requires such service in order to benefit from special education. Transportation is defined as:

- (i) Travel to and from school and between schools.
- (ii) Travel in and around school building
- (iii) Specialized equipment (such as special or adapted buses, lifts and ramps), if required to provide special transportation for a special needs child (121a.13)

Deciding When Transportation As A Related Service Is Important

The director/supervisor of pupil transportation must be in on this decision. These guidelines should be used to determine if transportation is a required related service:

1. If a child is not identified as needing special education, there can be no related services and special student transportation is not covered under P.L. 94-142.
2. If a child is identified as needing special education and transportation as a related service, then provision of this service must be without cost to the parents or guardians.
3. The need for special education does not automatically authorize the need for transportation. This is an IEP Committee pupil transportation personnel decision.
4. Pupil transportation personnel and an IEP Committee should examine each transportation service situation independently. School district procedures should be developed in line with Federal and state requirements.

Written procedures for deciding the need for transportation, as a related service should be developed. This should ensure that decisions are consistent. Individual cases should be determined in accordance with the procedures outlines.

Two (2) situations which require a determination are:

1. If a student resides within, the prescribed walking distance to a school, but due to the nature of the special needs condition the student cannot safely reach the school, then transportation service is an appropriate related service recommendation.
2. If an emotionally special needs student has been suspended or transferred from a school to which the student previously walked and is being sent to a school, which

exceeds the prescribed, walking distance, this student should now be provided transportation as a related service.

SBARC ROLE

The method of providing transportation for handicapped students should rest with the director/supervisor of pupil transportation with input from the School Based Admissions and Release Committee (SBARC). The SBARC should make a comprehensive inventory of the pupil's needs as they relate to transportation.

1. The type of vehicle must be determined in advance. Some students may need to be transported in wheelchairs, or may require a specially designed car seat or vest to provide torso and/or head support.
2. Significant medical problems should be documented, especially the possibility of seizures, etc.
3. Alternate emergency drop-off points and telephone numbers of specified contact persons, shall be obtained.
4. Late registration or placement of a student into a different program after school begins usually affects routing and time schedules of one or all students on the bus. Several days time may be required before all schedule adjustments are made and possibly effect the start of transportation services for a particular student. A minimum of five school days planning time is usually required. Changes should not be made late in the school year unless absolutely necessary.

Additionally, the SBARC must be familiar with state statutes, state and local regulations and policies for special needs transportation and should communicate to parents and/or guardians the statutes and policies in order to promote support and understanding of the transportation program.

In dealing with the SBARC and parents, the following topics should be covered:

VEHICLE OWNERSHIP

P.L. 94-142 does not specify ownership requirements. A variety of options are available to provide transportation. A local school district can accommodate special needs students' transportation needs by:

1. Owning the transportation vehicles
2. Contracting for transportation services (public and private)
3. Renting transportation vehicles
4. Sharing of ownership of vehicles
5. Reimbursement of a private carrier.

Transportation ownership demands vary throughout the various local school districts.

LENGTH OF THE RIDE

Neither P.L. 94-142 nor Section 504 provides regulations on the length of the school bus ride to receive special needs services. This matter is to be addressed by local school systems. The maximum length of the ride should be determined on an individual basis and reviewed periodically. These factors should be considered in determining the length of the ride:

1. Location of the home to assigned school
2. Nature of the special needs (possibly necessitating a distant school placement)
3. Rush hour traffic in urban areas
4. Other unique situations requiring special arrangements

LOCATION OF PICK-UP AND DROP-OFF POINTS

P.L. 94-142 and Section 504 do not establish requirements regarding pick-up and drop-off locations. Each school district should have a written procedure regarding pick-up and drop-off practices. When special transportation services are required, the local school district should be responsible for picking up special needs students at the residence of their parents or guardians unless prior alternate arrangements are mutually agreed upon. In addition, parents or guardians should be responsible for getting the special needs child to the driver or curbside and for meeting the vehicle at the end of the school day at the drop-off point. Deviations because of individual circumstances should

be agreed upon on an individual basis as noted on the IEP. Location of loading and unloading sites for students with special needs conditions may require alterations from standard operating procedures. In addition, there should be a written procedure on how to handle the situation when no authorized person is available to receive the student.

COST

Transportation must be provided at no charge to a special needs student if this service is required. Insufficient transportation funds, is never a valid reason to deny this related service to a special needs person. When a local school system approves the placement of a special needs student in a program it does not operate, it must ensure that transportation is provided at no cost to the parents. If the school system and parent agree that the parent will transport the child to a public or non-public school, this agreement should provide for reimbursement to the parent. P.L. 94-142 and Section 504 do not set a reimbursement schedule. Most state and local education agencies use typical employee travel reimbursement tables to determine the amount of payment. General cost issues should be worked out prior to service delivery. The school system should check to make certain that parents providing transportation have a valid license and meet individual state insurance provisions. When a special needs student is placed in a (distant) residential facility for educational purposes, P.L. 94-142 does not set a standard for the number of allowed trips home. At minimum, most school systems provide transportation at the beginning and end of the school term and for scheduled school holidays and/or recesses. It is the responsibility of local school districts to have written procedures defining this area. The number of trips home should be stated on the student's IEP. Disputes regarding transportation cost, length of the ride and location of pick-up and drop-off points could be the subject of due process hearings.

TYPE OF VEHICLE

P.L. 94-142 and Section 504 do not specify the type of vehicle on which special needs education students should be transported. P.L. 94-142 states: "Specialized equipment (such as special or adapted buses, lifts and ramps), if required to provide special transportation. Special needs students may be transported on a variety of vehicles which include:

1. Standard School Bus
2. Minibus

3. Commercial Carrier Bus (only if placed in a situation located outside the local school district)
4. Private Vehicle
5. School Bus with Adapted Equipment (lift, etc.)

The vehicle choice will be made by the director/supervisor of pupil transportation based on input from the SBARC. The choice will be entered on the IEP.

ASSISTIVE DEVICES

Assistive devices include crutches, canes, walkers, braces and wheelchairs. Special needs students who use assistive devices require careful individual consideration. A qualified member of the IEP committee should address the use of an assistive device as it pertains to the transportation vehicle when procedures (adaptations) beyond standard equipment are recommended. Adaptive procedures should be explicitly defined on the IEP. An example of this would be the use of safety belt or vest to hold a child securely in a position to conform with a physician's prescription. The securing of a child in the wheelchair must be determined and the parent shall ensure that the method used meets the approval of the local school district. The local school district should be able to use various types of adaptive equipment to ensure that the child has a safe ride.

EMERGENCIES

School bus drivers and aides should be familiar with the students they transport and the characteristics of the special needs conditions associated with these individuals. Learning about individual special needs students, will aid in proper identification of what is, or is not, an emergency situation. It is important that drivers and aides be instructed to respond appropriately to each situation. Adequate training could possibly eliminate potential danger. Student emergency cards should be carried on the school bus. Parents should complete an emergency card annually and approve the use of this information.

EVACUATION DRILLS

It is essential to have a written plan for emergency evacuations for those students who use assistive devices and/or wheelchairs. Evacuation procedures should be well known and rehearsed by drivers and aides to assure competent handling of both ambulatory and non-ambulatory students if an

emergency situation should arise. Drivers and aides should be able to evacuate all passengers through all available exits with or without the use of a hydraulic lift. Written directions should be posted near all mechanical apparatuses requiring special operating skills and knowledge. Special needs students with physical, emotional and mental limitations should be familiarized with safe and organized evacuation procedures. Regardless of whether special needs students ride a regular bus or specially adapted buses, they should be instructed to function within their individual capabilities. These procedures should be written and practiced with periodic drills. A written plan should include:

1. Emergency stop location
2. Phone locations if there is no two-way radio system
3. Charted (shortest) routes to hospitals.

A seating chart with student photographs should be available for non-verbal students. Photographs should also be attached to emergency cards. This is a necessary precaution for situations in which a driver could be incapacitated or unable to identify students.

TRAINING OF PERSONNEL

The school district's liability for transporting special needs students increases if school personnel are not trained. Training should be conducted on a regular basis. In-service training for drivers of special needs buses should include, but is not limited to:

1. Characteristics of special needs conditions
2. Behavior management techniques
3. Seating selection/assignment methods
4. Schedule management
5. Care and management of assistive devices
6. Communication with parents and students
7. Special evacuation procedures
8. Emergency management procedures
9. First aid training to include CPR
10. Loading and unloading procedure

11. Disciplinary procedures

SPECIAL NEEDS STUDENT MANAGEMENT

Behavior management is the shared responsibility of both driver and aide. The driver or aide servicing special needs students requires knowledge and skill in managing special situations. Appropriate behavior management is necessary to ensure safe transit. An effective driver and aide team is one that provides for a systematic arrangement of the vehicle environment allowing maximum opportunity for the exhibiting of appropriate student behavior. This can only be done after there is a clear understanding of special needs conditions, and how each condition may or may not be directly related to the need for specific behavior management intervention.

Deaf students may or may not require special transportation services. The transporters of deaf students should be familiar with total communication if this is the student's primary method of communication. This is one appropriate way to facilitate both rapport and safety. Paper and pencil allows for communication with older deaf students.

Hard of hearing students can be transported on regular vehicles; however, the transporter of this population should receive special training in effective communication. Deaf and hard of hearing students must understand expected bus behavior prior to being transported.

Mentally retarded students range from mildly to profoundly intellectually limited. Transportation service needs are dependent on the student's independent level of functioning as well as the location of the school. Simple and clear instructions are a necessity. Realistic expectations should be set up to avoid frustration for the transporter, student and parent(s).

Multi-handicapped students may or may not be ambulatory. These students require careful transportation because of their limited independence and/or severe mobility limitations. This population often requires close supervision and special consideration to ensure maximum school bus safety.

Orthopedically impaired students require special transportation services to meet individual mobility and safety needs. A carefully designed program that outlines such transportation and appropriate use of adequate equipment is essential.

Other health impaired students include those with asthma, heart conditions, etc., who require individual consideration. Most often these students conditions are not visible to the driver. These students may utilize the regular school bus or may need specifically prescribed adaptations.

Seriously emotionally disturbed children may require special transportation. In some instances, an aide is needed to manage inappropriate student behavior. Transporters of these students should receive behavior management training.

Specific learning disability students rarely require special school bus transportation unless they are attending a special school, but many require patience and understanding because of language and information processing problems.

Speech impaired students do not require special school transportation because of their special needs, though transportation may be required because of the school's location.

Visually impaired students may or may not require special transportation; however some students may need assistance when moving about on the school bus to maximize safety.

Deaf/blind students require special consideration to maximize mobility, safety and communication. Transporters should receive very specific training in mobility orientation and in total communication.

It is important that drivers, aides and transportation personnel know what to expect from each student. The desired appropriate behavior may be achieved by:

1. Establishing a daily routine
2. Driver and aide functioning as a cooperative team
3. Minimizing the number of bus rules as much as safely possible
4. Making sure students have the ability to understand the rules
5. Communicating on the level of the student

6. Rewarding appropriate behavior with attention and praise
7. Handling problems in a consistent manner and within school system guidelines

DRIVER ASSISTANT'S TASKS AND DUTIES

Driver Assistants should be placed on vehicles that transport students who demonstrate behavior(s), which could disrupt the driver. The driver assistant would be able to perform the following tasks:

1. Manage behavior
2. Manage seating. Not assign seating.
3. Operate the lift system
4. Supervise assistive devices usage
5. Load and unload students
6. Assist with emergency management
7. Assist with evacuation procedures
8. Implement special I.E.P. services
9. Communicate effectively with students
10. Communicate and establish positive relationships with parents.

The job description of both the driver and driver assistant should be spelled out in detail so that each knows their role.

First Aid Training

First aid training is a must for both driver and driver assistant. At a minimum, each should be trained in first aid by successful completion of a recognized first aid course (example - American Red Cross).

Disciplinary And Suspension Procedures

Special needs students, like all students, are subject to disciplinary action(s) pursuant to the written rules of state and local education agencies. However, school bus disciplinary or

suspension action should require an IEP committee review when this service is being provided as a related service. Since a special needs student may not be subjected to punitive action solely on the basis of being special needs, the problem that arises is determining the relationship between the proposed disciplinary action and the special needs condition. When the behavior for which the student is to be removed from the transportation service is the result of the student's special needs condition, the student cannot be deprived of access to special education. This is not to say that, if the behavior is of danger to the driver, driver assistant and/or other students, transportation may not be interrupted. However, it is recommended that an interruption in this service would necessitate an "emergency" IEP meeting to determine the relationship of the behavior causing disciplinary action to the child's special needs condition, and to determine alternative transportation services or methods.

It is suggested that the suspension of the privilege of riding a school bus not exceed five (5) school days for each incident. Should a suspension of transportation services exceed five (5) school days, the child and parents must be provided with procedural safeguards, and an IEP meeting should be called to determine if the student's special needs were a significant cause of the behavior that prompted the disciplinary action. If the determination is "yes," then the suspension should be rescinded. If the special needs was not a significant cause of the behavior, then the student should be subject to disciplinary procedures, which apply to all students who commit the same act. Written procedures should be developed to cover this process.

RULES AND REGULATIONS FOR PROVIDING TRANSPORTATION FOR SPECIAL NEEDS STUDENTS

These rules and regulations should be given serious consideration by the local school system as it transports special needs students. Much, if not all, of these rules and regulations should be adopted as local board policy. The local board policy for the transportation of special needs students should include:

1. Director/Supervisor of Transportation Responsibilities
2. Teacher Responsibilities
3. Parent or Caretaker Responsibilities
4. Qualifications for Special Needs School Bus Drivers
5. Qualifications for Driver Assistants

6. Driver and Driver Assistant Responsibilities
7. Loading and Unloading Responsibilities
8. Communication Equipment for Buses
9. Transportation of Medication
10. Emergency Information Card
11. Discipline of Students

DIRECTOR/SUPERVISOR OF TRANSPORTATION RESPONSIBILITIES

The director/supervisor of transportation is responsible for implementing the policies set by the local Board of Education, and for promoting public understanding of, and support for, the school system's special needs transportation program. The director/supervisor shall ensure that the following policies and procedures are implemented and followed:

A.M. Unloading: Principal or designee should be on site at the morning unloading area. The bus driver or aide will not be allowed to leave special needs students **unattended**.

P.M. Dismissal: Principal or designee should have the students ready at dismissal time.

BUS SUSPENSIONS

The local school district shall develop a policy relative to bus suspension procedures.

Upon receiving a written complaint, the appropriate school official should respond as soon as possible. An immediate response to a problem will be of great benefit to all concerned.

Suspension from the bus does not mean that a student is suspended from school (the parent or caretaker will be responsible for transporting the student to and from school).

In the event that it is necessary to suspend a student from school as well as the bus, the local Board policy on long and short-term suspension of special needs students will apply.

The school district administration should designate a persons(s) to be available until all special needs buses have completed their trips and all students have been properly delivered. All

drivers are to be informed of person(s) who have been designated to take custody of delivered students.

TEACHER RESPONSIBILITIES

Safe and successful bus operation can be enhanced through regular and continuing education of all persons involved in the special needs transportation process. The teacher, together with the bus driver and/or the bus aide, make students aware of their responsibilities on the bus. With careful planning the special needs school bus can be a valuable extension of the classroom experience.

Be familiar with state and local policies on special needs transportation.

Communicate to parents, caretakers and students the state and local policies and regulations for special needs transportation in order to promote understanding and support for the school system's special needs transportation program.

Communicate regularly with the bus driver and/or bus aide regarding the special needs of students.

Supply information to the driver and/or bus aide regarding behavior modification so that consistency can be maintained. The teacher should explain techniques, which work with specific students, realizing that the bus is an entirely different setting.

Discuss the teacher's expectations for bus behavior with the driver before the school bus term begins. This should be done in order to clarify the teacher's and bus driver's expectations for the student's behavior. Follow established procedures for loading and unloading students. Have the students ready at dismissal time.

Load all students at one designated time in the afternoon. When students straggle out of the classroom over a long period of time, students on the bus become restless and disruptive behaviors can be the result. Coordinate loading times with other teachers if there are several special needs programs in the school.

Distribute classroom materials in the classroom before the students get on the bus to return home.

Notify the driver when a parent has picked up a student from school so that the driver does not have an unnecessary delay. Notify the bus driver when a parent brings a student to school late. Advanced notice to the driver will reduce the possibility of a student being inadvertently left at school.

There may or may not be storage areas on school buses, therefore, rewards given in the classroom should be of a nature that would not require assistance from either the driver or aide in transporting them.

Tell the driver what kind of day the student has had, especially if it has been bad. This helps alert the driver to a potential problem. It may be helpful to seat a student in a different location on the bus.

Instruct the students on required bus behavior and school bus safety as a part of classroom discussions and activities. The teacher should assist the student to develop an attitude of respect and courtesy toward the driver and bus aide.

Give the bus driver adequate notice concerning any changes in pick-up or drop-off addresses.

Refrain from asking the bus driver to change the route pattern and pick-up or dismissal times, as the driver is not allowed to change or modify bus routes.

PARENT OR CARETAKER RESPONSIBILITIES

Have your student ready to board the bus when the bus arrives and be with the student at the bus stop.

Encourage your child to obey safety rules and regulations and encourage proper bus behavior.

When the student is delivered to the assigned address at the end of each school day, the driver will NOT be allowed to leave the student unattended. Parents are responsible for making arrangements to have a designated person receive the student. A parent or caretaker may request permission to leave the student unattended in writing from local school officials.

Have all necessary supplies, materials or medications, etc., in a pouch or a packet labeled with the student's name. In consideration of student safety, large articles, which block the aisles, emergency door or service door of the school bus will not be allowed on the bus. Exception: Physical Aid Equipment, such as canes, walkers, braces, etc., if properly secured.

Do not allow students to drink or eat food on the bus. The danger of a student choking on food is a high risk factor.

Know where the student is to be picked up each morning and delivered in the afternoon. In the event that the student needs assistance to get to or from, on or off the bus, the parent should cooperate by making arrangements for bringing the student to the bus and for picking up the student on the return trip.

In the event that the student does not plan to attend school on a specified day, the parent/caretaker should:

1. Notify the bus driver and/or appropriate school official one full school day in advance (if possible).
2. Inform the bus driver when the bus arrives at the student's home.
3. Use a pre-arranged signal with the driver.

Prepare a student emergency information card as required by this regulation. This card includes emergency phone numbers and/or addresses of responsible person to be contacted in case of an emergency.

Give at least a five (5) full school days notice concerning any changes in pick-up or drop-off address. The driver is not allowed to change or modify a bus route. Do not ask a driver to violate this policy.

Make plans to transport their student in the event of a bus suspension.

QUALIFICATIONS FOR SPECIAL NEEDS SCHOOL BUS DRIVERS

A driver of a special needs vehicle shall meet the same qualifications and licensing requirements as a regular driver.

Special needs drivers shall be required to attend other special training programs as designated by the local district.

QUALIFICATIONS FOR DRIVER ASSISTANTS

Driver Assistants will attend special needs training programs and a first aid course as determined by the local school district.

Driver Assistants shall be a minimum of eighteen (18) years of age.

Driver Assistants shall attend all training programs given relating to the transportation of special needs pupils.

DRIVER AND DRIVER ASSISTANT RESPONSIBILITIES

The following rules and regulations are applicable to drivers and driver assistants. They serve as guidelines for the operation of special needs transportation programs. The driver and driver assistant shall:

Obey all regular school bus operational regulations, (unless exceptions are specified), state and local policies and traffic laws.

Maintain and keep current transportation confidential emergency cards and other required reports. This information is to be maintained in accordance with the Family Education and Privacy Act, and state and local special needs regulations.

Refrain from administering any medications except, when a signed consent is given by the parents, caretaker, or doctor with the prescribed information relating to the name of the medication, dosage, etc.

Withhold from a student any type of food (candy, gum, soft drink, etc.).

Exercise patience, understanding and mature judgment in working with a special needs student.

Communicate effectively with parents and school staff.

Utilize and safely operate the special equipment needed for each student's seating, loading and unloading.

Know the safest and most direct route to a hospital or recognized medical center.

Arrange the seating of students, where possible, to prevent emotional or physical disturbance (but allow "normal" interaction between students). The special needs teacher for these students may be of great assistance in these situations.

Explain bus rules to students and enforce them, remember:

- Be firm - but gentle.
- Be patient - but persistent (fair).
- Always be consistent.

Maintain discipline and report to the proper school authorities and/or parents any unusual episodes, attitudes, etc., immediately and in detail, because they may have medical implications. Any student who is a threat to the safety of the other students, themselves and/or the driver should not be permitted to ride the bus. Administrative procedures will be followed when exclusion of a child is considered.

Be willing to learn how to care for each student under the many circumstances that might occur while the students are on the bus. Eye contact usually reveals problems that may occur.

Know the appropriate procedures to take in case of a traffic incident or a breakdown.

Maintain the bus schedule for pick-up and delivery of students as safety will permit.

Adhere to an established route unless there is an emergency.

Make sure that a student is not left unattended on the bus or at the drop-off point. If no such authority has been granted, the driver follows the local district's procedure for handling the situation.

Communicate with school personnel and parents when a student is on medication, and establish what possible effects the medication will have on the student being transported.

Assist each student in meeting therapeutic needs as indicated by appropriate school personnel such as learning to get on and off without assistance.

In addition to the above request, the special needs aide shall:

1. assist in the loading and unloading;
2. maintain control of students while on the bus;
3. take care of any special needs of the students while they are on the bus; and
4. assist the bus driver in times of need and during emergencies.

Loading And Unloading Students

Normally, the bus driver will follow the same loading and unloading procedures as for regular transportation.

The type and severity of the special need will usually determine where the actual bus stop will be located, within the following guidelines:

Students who cannot be left unattended will be loaded and unloaded in front of each student's home or pick-up/drop-off point.

Other students may be able to walk to and from the bus stop, and this may be required as part of their therapy. Written directions shall be provided to the driver by the parent or caretaker and the school district.

The bus stop will be determined by the school officials. Recommendation from the doctor, special needs administrators and parents may be considered.

If a driver assistant is not utilized to load and unload, the bus driver shall:

Stop the engine, set the parking brake, put the transmission in first or reverse gear in a manual transmission equipped bus, or in the “park” position, and remove the keys before getting out of the driver’s seat.

Learn to handle special equipment that the student must use, such as crutches, braces, wheelchairs, etc., during loading, unloading and securing.

Take care at all times to keep all students on the bus while others are being loaded or unloaded.

Safety devices will be used when required. (For the emotionally disturbed or hyperactive child, seat belts may represent unpleasant restraints. A cooperative effort by the driver to explain how to use them comfortably and safely will minimize the student’s concern.)

Utilize safe and correct lifting techniques for students who must be physically lifted.

TRANSPORTATION OF MEDICATION

The driver and/or driver assistant may accept the transportation of medication, pursuant to local Board policy, from the parent and/or caretaker; however, the driver should have a form, which is dated and should sign the acceptance for the medication, from the parent.

A secure compartment must be provided for the driver to store medications.

Upon arrival at the student’s destination, the person receiving the medication from the driver should sign the acceptance.

All medications must be clearly identified with the student’s name.

EMERGENCY INFORMATION CARD

In order for the driver and/or driver assistant to be informed by local school officials concerning the physical, mental and/or emotional disabilities of each student, a Confidential Emergency Card will be provided on each student. A 5" X 8" card is recommended and must be kept on the bus. A local school district may require that a copy be retained at the transportation office, as well.

Each card shall include, but is not limited to, the following information:

1. Student's name, date of birth and school.
2. Parent's name.
3. Address, with loading and unloading instruction for a.m. and p.m.
4. Home telephone and emergency telephone numbers, i.e. doctor, parent(s) and teacher.
5. Nature of child's requirements as it pertains to transportation needs, and special bus provisions.
6. Suggested steps to be taken by the driver, or the driver assistant, in the event of illness, seizures, etc., while riding the bus.
7. Emergency medical information, medication(s) student is taking, and special instruction for attending physician.
8. Individual student special loading and unloading requirements pursuant to those conditions identified in the student individual education program (I.E.P.).
9. Individual student special handling requirements during emergency evacuation pursuant to those conditions identified in the students IEP.

These cards must be treated as confidential records.

Discipline Of Students

The following suggested procedure will protect the pupil's rights and maintain order on the bus:

The driver and the driver assistant should attempt to handle infractions through discussions with pupils and/or re-assignment of seats. (Sometimes a call to the parents will improve behavior.)

First offenses require, at the minimum, a notification to the pupil and parent(s) by phone or in person. Second or subsequent offenses or infractions of the rules may require a conference with the pupil, parents, driver and school administrator(s) and could result in a suspension of the pupil's bus riding privileges.

In case of serious or recurring misconduct, a pupil's bus riding privileges may be promptly suspended for acts that jeopardize the safe operation of the bus and/or the safety of the other students on board.

CHAPTER 6

MAINTENANCE

Careful examinations of school bus fleets indicate that the most efficient and successful pupil transportation programs are a result of a commitment to a comprehensive, well-planned vehicle maintenance program. The maintenance of vehicles is done on a schedule and is preventative in nature. While it may appear that scheduled maintenance increases the overall operating cost, the opposite is true because preventative maintenance, properly applied, will ensure that a vehicle is safer to operate, experiences fewer costly road failures, and is overall more reliable and economical to

operate than a vehicle maintained on a demand basis. This method allows for the planning of work schedules, which more efficiently uses service personnel and allows for a more accurate forecast of maintenance cost, which is vital when making out annual budgets. The maintenance program outlined in this chapter will ultimately lead to cost effectiveness. Although the record keeping requirements seem burdensome, it will become second nature after a while and will provide the needed information on which to make sound decisions and provide safe, efficient and economical transportation for your school system.

OBJECTIVE

Provide Kentucky school districts with a uniform systematic maintenance management system designed to:

- Maintain all transportation vehicles in safe operating condition.
- Maintain all transportation vehicles on a cost effective basis.
- Provide a cost accounting system for all maintenance and transportation expenses.
- Provide methods of purchasing.
- Generate reports necessary for cost accounting, audit trail, inventory, purchasing and all other statistical needs.
- Identify maintenance facility needs.

All of the above objectives can be met with the following maintenance management system. However, the same objectives can be met with other systems using other forms or a combination of forms. All other maintenance management systems employed must generate the same information as the suggested system generates.

702 KAR 5:030 - Section 2

The superintendent shall require that a safety inspection be made on each school bus owned and operated by the board or contracted to the board at least once each month that the district's schools are in session. This inspection shall be made by a state approved inspector. If, upon inspection, a school bus is found to be in unsafe operating condition, the superintendent shall withhold the bus from operation until the required repairs are made. The superintendent shall keep the records of the bus safety inspections on file.

702 KAR 5:080 - Section 20

A driver shall make a pretrip inspection of the bus safety and operating equipment each time that the bus is taken out for the transportation of pupils.

INSTRUCTIONS FOR SCHOOL BUS MAINTENANCE MANAGEMENT SYSTEM

Purpose

Proper and cost efficient maintenance can only be achieved through the use of a quality school bus maintenance management system. The intent of the school bus maintenance management system is to provide all Kentucky school districts with a similar plan of school bus maintenance.

The maintenance plan encompasses service writing, inventory control, data collection and data processing. Components of maintenance management systems are:

1. Work Order
2. Preventative Maintenance Reports
3. Service Run Requests
4. Parts Inventories
5. Purchase Orders
6. Scheduled Repairs
7. Daily Fuel and Mileage Reports
8. Individual Vehicle Folders
9. Financial Reports
10. Data Processing Reports

IMPLEMENTING A MAINTENANCE MANAGEMENT SYSTEM

The director/supervisor of pupil transportation coordinates and instructs maintenance personnel as to proper application of maintenance management systems and the control process necessary to ensure the efficient use of maintenance systems. The school bus maintenance facility must be staffed in a manner conducive to employment of a maintenance management system.

Staffing

Proper implementation of the maintenance management system requires staffing arrangements in the manner of:

1. Service Manager
2. Lead Technician/Inspector Technician

To cost effectively perform school bus maintenance, other staffing needs may result:

1. Parts Manager
2. Service Writer
3. Clerks
4. Parts Personnel
5. Inspector
6. Auto Body Workers

Copies of these job descriptions are contained in the Kentucky Local District Classification Plan.

Work Order

The work order is a three-part (3) form, which is to be completed at the time work is performed on any vehicle. Initial work order writing is to be performed by the service manager with the hard copy distributed to the mechanic performing the work. A vehicle out-of-service ticket is to be affixed to the steering wheel of any vehicle restricted from use for need of preventative maintenance, inspection or repair. The out-of-service ticket shall remain with the vehicle until required work is performed, at which time, the ticket will be removed and become part of the work order supporting documentation.

PREVENTATIVE MAINTENANCE INSPECTION REPORTS

The PMIR (Preventative Maintenance Inspection Report) control system is designed to give shop management (Director of Vehicle Maintenance and Garage Foreman) a method of

scheduling and controlling the necessary cycles of maintenance inspections performed. Refer to INSTRUCTIONS FOR PREVENTATIVE MAINTENANCE.

Driver Inspection

School bus drivers shall be responsible for the completion of a driver inspection report each day the bus is placed into service. Repair work indicated as a result of the driver inspection report will flow back through the maintenance management system via a work order.

All bus drivers are required by the Commercial Drivers License Act and Kentucky Administration Regulation, 702 KAR 5:080, to perform daily pre-trip inspections on their vehicles and to report promptly, in writing, any defects discovered that might affect the safety of the vehicle operation or result in mechanical breakdown.

NOTE: The form must be kept daily and used as documentation of driver inspection or used as needed for reporting defects and driver requests for maintenance.

Service Run Request

All service runs require completion of a service run request compiled into a monthly service run summary. Work generated by service runs shall be documented by a work order.

Parts Inventory

All school bus maintenance facilities should have an inventory of those school bus parts whose flow generates the need for stock requirements. Inventory control shall be accomplished by a perpetual inventory system with parts entry and removal recorded daily. A fiscal inventory should be conducted annually.

Purchase Orders

All purchase of school bus parts should be the responsibility of the service manager, or his designee, with parts purchases accomplished by means of assigned and numbered three-part (3) purchase order requests or MUNIS generated purchase orders. Payment will be disallowed on any purchase not verified by purchase orders and signed invoices.

Daily Fuel and Mileage Reports

A log of vehicle fuel and oil usage, showing current mileage, shall be completed and filed as part of the maintenance management system.

Individual Vehicle Folders

The maintenance copy of the work order and all of the aforementioned supporting documents should be filed in the individual maintenance folder with the history of the vehicles and vehicle repairs recorded on the folder cover. Individual vehicle folders are to be retained in the maintenance facility and will serve as cost accounting documentation to qualify for pupil transportation cost reimbursement. The preventative maintenance management system will generate necessary financial and data processing reports. Reports which can be generated by the preventative maintenance management system are:

Data Processing Reports That May Be Used

1. Preventative Maintenance Inspection Reports
2. Inspection Reports
3. Fuel Usage Reports
4. Maintenance Cost Reports
5. Inventory Control
6. Summary of A, B, C, D Inspections
7. Individual Vehicle Reports
8. Individual Vehicle Summary By Repair Type and Work Code
9. Parts and Supplies Order Schedule
10. Preventative Maintenance Inspection Schedule
11. Fleet Summary Reports
12. Fleet Summary By Repair Type and Work Code
13. Model Summary Reports
14. Model Summary By Repair Type and Work Code

SUMMARY

Although it might be time consuming, a Comprehensive Maintenance System is the key to keeping school buses running economically and efficiently. To be effective, a maintenance system must focus on preventing problems. This means frequent checks of all buses, routine preventative work for mechanics, and replacing parts that are worn out. Preventative maintenance means that buses are less likely to have major breakdowns on the road. A preventative maintenance schedule means lower term costs.

As a minimum, your bus maintenance program should include the following:

1. Documented pre-trip inspections by drivers.
2. Scheduled preventative maintenance inspections.
3. Service intervals that are no greater than manufacturer's recommendations.
4. Documented monthly safety inspections by a State Approved School Bus Inspector; records of repair and parts cost.
5. Records of fuel and oil use.
6. Individual vehicle history and maintenance file.

Preventative Maintenance Inspection Reports

Kentucky Administrative Regulation, 702 KAR 5:030, requires that a safety inspection be made on each school bus at least once a month when schools are in session. Scheduled servicing and thorough periodic inspections by state approved school bus inspectors should be carried out in accordance with the recommendations of the manufacturers' service manuals, making allowance for any unusual operating conditions. Since all vehicles are designed and constructed to operate within specific limitations, each district must establish strict service intervals that will achieve optimum safety, vehicle longevity and cost savings. In no instance should maintenance intervals be greater than the manufacturers' recommendations. The service interval for all vehicle components, not being the same, necessitates categorizing group components into separate service intervals. This can be done by identifying and grouping the components needing service or inspection more frequent than those with the next higher frequency rate and so on until the entire fleet has been scheduled for service and/or inspection.

The following preventative maintenance and safety inspection system is designed to give shop management an improved method for scheduling and controlling the necessary cycles of inspection and maintenance.

Inspection A, when complete, will serve as documentation for the required monthly safety inspection. Inspections B, C and D are shown with suggested mileage intervals (refer to manufacturer's recommendations for actual requirements). The type and interval for a Preventative Maintenance and Safety Inspection schedule will be as follows:

<u>TYPE</u>	<u>INTERVAL</u>
1. Inspection A - Safety Inspection/Brake Adjustment	Monthly
2. Inspection B - Inspection A plus Oil Change	3,000 miles gasoline or 6,000 miles diesel or or Service Manual Recommendation for Severe Service
3. Inspection C - Inspection A and B plus Tune-up	12,000 miles gasoline only
4. Inspection D - A, B, and C plus Transmission	24,000 miles

MAINTENANCE MANAGEMENT AND COST ACCOUNTING FORMS

While the system of maintenance records may be tailored to the needs and capabilities of the individual school transportation operation, the number of reports and records needed will depend upon the size of the operation and the number of persons associated with it. Preparation of any record should be justified by the use made of it. No record should be kept which does not contribute directly to the efficient management of school transportation operation. Reports which can be generated by the maintenance management system are:

Data Processing Reports That May Be Utilized

1. Preventative Maintenance Inspection Reports
2. Inspection Reports
3. Fuel Usage Reports

4. Maintenance Cost Reports
5. Inventory Control
6. Summary of A, B, C, D Inspections
7. Individual Vehicle Reports
8. Individual Vehicle Summary By Repair Type and Work Code
9. Parts and Supplies Order Schedule
10. Preventative Maintenance Inspection Schedule
11. Fleet Summary Reports
12. Fleet Summary By Repair Type and Work Code
13. Model Summary Reports
14. Model Summary By Repair Type and Work Code

EXAMPLE FORMS USED WITH MAINTENANCE SYSTEM

While individual forms may differ from district to district, it is important that the information gathered be consistent. Examples of forms that maybe used are contained in the State Maintenance Form Booklet available to all local school districts.

SCHOOL BUS MAINTENANCE FACILITY

A properly designed and equipped school bus maintenance facility must be adopted for quality cost effective school bus maintenance.

702 KAR 1:001 Chapter 4 (Facilities Management) is the authority governing school bus maintenance facility construction.

PLANNING THE SCHOOL BUS GARAGE

When planning a school bus maintenance facility, careful consideration must be given to the following factors influencing the decision to build or construct:

1. Cost of services being provided by local garages.
2. Availability of facilities for a maintenance garage.

3. Availability of maintenance personnel.
4. Other machine and tool maintenance costs. (All schools need repair and maintenance of tractors, trucks, cars, mowers, etc. Savings can be made by servicing such equipment in the school bus garage.)
5. The amount of self-maintenance to be performed. (Small districts may want to contract major maintenance work but money can be saved by following a preventative maintenance program. Larger districts would save more with a complete self-maintenance program.)
6. Number and size of buses for the present and foreseeable future.
7. Number of service bays and type of service to be provided such as maintenance, repairs, tires, wash, etc.
8. Heating, electrical, ventilation and utility services needed.
9. The location and type of fuel storage tanks to meet the State Fire Marshal's regulations and Federal regulations regarding underground storage tanks.

GENERAL DESIGN OF BUS GARAGE

The general design of a school bus garage, as indicated below, is not a cut-and-dry procedure, but a basic approach that can be tailored to suit conditions in school districts statewide.

1. Walls, partitions and roofs should be of approved fire resistive materials.
2. Garages should be constructed to provide a minimum inside unobstructed height of sixteen (16) feet.
3. A bus garage should be planned with a series of bays with each bay to house a bus and served by an overhead door.
4. Repair and wash stalls should not be less than twenty (20) feet wide.
5. Minimum depth of garage should be fifty (50) feet. If bays are in tandem, the depth should be at least one hundred (100) feet. See attached chart for more information.
6. A wash stall should be separated from a repair bay by a masonry wall of sufficient height.
7. A concrete or metal threshold for entrance doors is essential. A concrete apron of adequate size and slope should be provided in front of each entrance door.
8. Floors should be concrete, reinforced with wire mesh, and properly pitched to floor drains. Concrete floors should be troweled, sealed and contain a hardener to prevent chipping and grease penetration.

9. Roof structures must be of sufficient strength.
10. Storage spaces for parts and supplies should be provided. If a fleet of considerable size is maintained, there should be a separate stockroom for parts. This room should be large enough for a desk and file space.
11. Lavatory and toilet facilities should be provided for mechanics and drivers.
12. It is practical to have a waiting room for drivers adjacent to the office area, which can be used in combination as a classroom for driver training purposes.

FACILITY EQUIPMENT

Facility equipment should include, but is not limited to:

1. One repair bay equipped with a hydraulic lift. If a lift is used, it should be a dual type with at least 35,000-pound capacity. The ceiling height minimum of sixteen (16) feet for the bay used for the lift should be sufficient to allow lift of the bus for proper working height.
2. The heating plant should provide for a minimum temperature of fifty (50) degrees inside when zero (0) degrees outside.
3. Wash stalls should be fitted with hot and cold-water hose bibs and drains with sewer traps.
4. Repair bays should be equipped with an exhaust pipe with flexible connection to remove engine exhaust fumes from the garage.
5. An air compressor should be of sufficient size to meet requirement of the garage's pneumatic equipment.
6. Fuel and oil service facilities should be convenient both to the buses and the office.
7. Liberal allowance must be made for both natural and artificial lighting of repair bays. Yard lights mounted on the building may be required.
8. Electrical service to the garage should be 220 volt, three-phase (3) as a minimum.
9. An eyewash and shower should be installed for mechanic's safety from corrosive materials and should include a shop first-aid kit.

CONTRACTED MAINTENANCE SERVICES

If a district chooses to contract its maintenance services, there should be a written agreement negotiated between the parties regarding extension of services, warranty of services and charges for services. Legal restrictions placed upon the districts regarding bidding and purchasing

should be considered when negotiating maintenance services. Various contracted services available to districts are:

1. Local service station: These usually offer only limited service such as fueling, tires, inspections, lubrications, minor part replacements and parking facilities. Districts with limited spare vehicles should take into consideration that service stations are not always able to render immediate service.
2. Local independent garages or dealers: May be able to provide services equal to a general repair center.
3. Other school districts: Those that own and operate their own maintenance facility may accept contract work.
4. Municipal, county or state shops: State highway and county road shops may offer fueling facilities more economically than other non-governmental agencies.
5. Specialized services: Shops specializing in items such as repair of upholstery, body damage repairs, painting and replacement of glass may offer the most economical service.

If a district contracts for maintenance service, it will be necessary to establish an adequate record keeping system. For instance, this would prevent excess mileage driving to and from a shop for minor repairs when other items could be performed at the same time. Regardless of fleet size or level at which a district operates, a staff member must be available to coordinate all inspections, service, preventative maintenance and other major repairs.

FULL SERVICE MAINTENANCE FACILITY	DESCRIPTION	MINIMUM	OPTIMUM	
SUPPORT AREAS	Work Bay	50' Long X 16' Wide X 16' High	60' Long X 20' Wide X 16' High	
	Wash Bay		60' Long X 20' Wide	
	Storage Loft		60' Long X 20' Wide	
	Toilets, Ladies – Men			
	Office, Supervisor – Service Manager			
	Driver's Lounge			
	Storage Area, Small Parts			
	Machine Shop Area			
	Battery Storage/Charge Area			
	Tire Change Area			
	Mechanical Room			
	Flammable Storage Area			
FULL SERVICE MAINTENANCE FACILITY	DESCRIPTION	MINIMUM	OPTIMUM	
EQUIPMENT AND BUILDING NEEDS	Twin Post Hydraulic Lifts			
	Exhaust System			
	30 Wiring			
	240 Volt, 4-Wire Outlets			
	240 Volt, 3-Wire Outlets			
	Air Compressor			
	Hot and Cold Water			
	Proper Lighting and Heating	Heating 50 at 0 Lighting, 100 Candle Work Area		
	Eyewash, shower and Other Safety Equipment			
FULL SERVICE MAINTENANCE FACILITY	DESCRIPTION	MINIMUM	OPTIMUM	
FACILITY SIZE	Work Bays for: 1-25 Buses	2 Work Bays		
	Inspections for: 1-265 Buses	3 Work Bays		

	Preventative Maintenance for: 50-75 Buses	4 Work Bays	
	Scheduled Repair for: 75-100 Buses	5 Work Bays	

NEW SCHOOL BUS PROCUREMENT OVERVIEW

KRS 156.152 requires the chief state school officer to secure price contract agreements for the purchase of school buses by all district boards of education in cooperation with the Finance and Administration Cabinet. In order to meet this provision, the Division of Audit and Transportation Services in cooperation with the Division of Purchases, annually sends out invitations to bid to pre-qualified bidders to secure the best and lowest contract price.

KRS 156.153 defines a school bus as any motor vehicle which meets the standards and specifications for school buses as provided by law or by the standards or specifications of the Kentucky Department of Education authorized by law and used solely in transporting school children and school employees to and from school under the supervision and control and at the direction of school authorities. Specifications are revised annually by a committee of local superintendents, directors, mechanics and driver training instructors. This committee recommends changes to the Kentucky Board of Education. If the changes are approved, they carry the force of law.

KRS 156.154 requires the chief state school officer to make available to all district boards of education full information regarding price contract agreements.

The Division of Audit and Transportation Services will send this information to each district superintendent in the form of a Purchase Authorization Form (PA-1, Regular School Buses; PA-2 Special Needs buses). A purchase authorization is a contract between a district board and the chief state school officer and is binding upon execution by the Division of Audit and Transportation Services. Purchase packages will be mailed in the fall of the year for delivery in the spring. Exact dates are dependent on contract provisions and vendor production schedules and may vary from year to year.

When the Division of Audit and Transportation Services receives a Purchase Authorization, an order is created and forwarded to the bus manufacturer (chassis and/or body company). A copy of the order will be sent to each district to confirm that the order has been placed and the Division of Audit and Transportation Services retains a copy. Orders received before the late date are bonded for performance by the vendors to minimize risk to district boards.

Units are piloted before production begins to ensure full compliance with the Kentucky Minimum Specifications and only units in compliance may be used to transport Kentucky school

children (702 KAR 5:060 Section 4 and 5). Changes in specifications by district personnel require approval by the Director of the Division of Audit and Transportation Services. This provision is designed to minimize liability incurred by the district Board of Education.

CHAPTER 7

PURCHASING

Purchasing in a Kentucky school district represents the expenditure of a large portion of its budget. Although needs and requirements may vary from district to district, this chapter is intended to furnish districts with guidelines and procedures, which can be adopted or adapted as individual situations may dictate. The principles set forth here can be applied to all purchasing in general, even though this particular chapter addresses itself solely to transportation purchasing.

FUNDAMENTAL CONCEPTS

It is mandatory that officials charged with purchasing responsibility conduct all aspects of procurement on the basis of sound business principles. Transactions should be fair and contribute toward good relations with staff, community and suppliers. The purchasing function can assist the educational program in achieving goals through procurement of needed supplies, services and equipment. In carrying out its responsibility, the purchasing can be both efficient and economical. The fundamental concepts of any procurement program should be based on the following:

1. Buy the quality standard for the purpose required.
2. Have the product or service available at the time and place requested.
3. Purchase on the most feasible and economical basis.
4. Purchase from the lowest responsible bidder or supplier meeting the required specifications.

ESTABLISH AUTHORITY

The Local Board of Education should appoint or designate the person or persons to whom the procurement functions are delegated. The administration of the school purchasing function is often the responsibility of a school official who fulfills other roles for the school. In smaller school districts, the purchasing responsibility may be combined with other assignments, such as a director/supervisor or transportation director, assistant superintendent or superintendent.

SUGGESTED BOARD POLICIES

Procurement of supplies and services is one of the major business responsibilities of the local Board. The mechanical functions of procurement may be delegated. However, under law, the Board has the sole authority and responsibility for all purchase contracts of the district.

Some suggested policies to be established by the local Board of Education are as follows:

1. The duties of purchasing should be assigned to designated individual(s).
2. The officials charged with purchasing should be familiar with, and perform all activities within, the limitations prescribed by law, legal opinions, and in accordance with Board policies.
3. Every transaction between a buyer and a seller involving the transfer of property should be maintained on a contract or purchase order with adequate supporting records.
4. Approval of purchase orders should be recorded in the minutes of the Board, as well as in bid tabulations, awards and contracts.

PURCHASING FUNCTIONS

The purchasing function encompasses the entire transaction, beginning with the initiation of a regulation and ending with the approval of the invoice for payment. Some control factors which precede the purchasing functions are:

1. Budget allocations.
2. Establishment of standard list.
3. Ordering schedule.
4. Obtaining necessary approvals.

The purchasing transaction is completed when the items requisitioned have been received in good condition and the supplier has paid the proper amount.

The basic functions of procurement are:

1. REQUISITIONING

It is recommended that a written request be initiated in accordance with established local Board of Education procedures. Information to properly identify the

items being requested should be included, and provisions should be made for the approval of the requisition.

Once approved, the requisition is processed for purchasing via one of five of the following methods:

- a. Telephone quotation.
- b. Written quotation.
- c. Formal bids.
- d. Negotiated bids.
- e. Cooperative bid lists.
- f. Purchase from state price contracts.

Upon approval, a purchase order or contract may be issued. If possible, the requisitioner should be provided a copy of the purchase order to verify the items being purchased, the terms, the conditions of purchase and expected delivery date.

2. SPECIFICATIONS PREPARATION

The Association of School Business Officials of the United States and Canada describes a specification as, “A description of the goods or services to be purchased in terms of the minimum acceptable physical characteristics, as well as the terms and conditions relating to delivery and performance.”

Writing good specifications is an exacting assignment. They may be written by the director or supervisor of pupil transportation. A poor specification, one, which is worded in broad and general terms, usually attracts quotations from a large number of suppliers and is likely to invite marginal or unreliable bidders. Good specifications go a long way in eliminating this problem and, when enforced, protect the school district.

Many times school suppliers are asked to help in the preparation of specifications. In such instances, care should be taken to see that other companies are not eliminated from bidding.

There are three (3) types of specifications commonly used. They are:

- a. Brand Name with Number - Brand name with number should be used only if there is a qualifying statement, such as, “or equal” or “for specification purposes only.” Brands that are used as specifications should be well known among all suppliers. Catalogs should be available which list the specified items with number and general descriptions. The bid form should provide a space for a bidder to write in the particular brand and the number he/she is bidding if quoting other than the one listed on the specification. An advantage of this type of specification is that it requires a minimum of time to prepare.

Suppliers are usually brand conscious; therefore, it is easy for them to determine exactly the quality and type of material being bid.

On the negative side, such specifications may be challenged on the basis that bids have to be evaluated subjectively. Another criticism might be that the brands listed are those favored by the school district.

When the school district has predetermined the quality desired, only qualified items should be considered. In doubtful situations, a detailed description should be requested. It should also be stipulated that any item not meeting all aspects of the specification should be fully described and the item identified as an alternate bid.

- b. General Description - This specification involves the use of brand names and numbers in a general manner, which is intended to indicate the quality desired. This approach has considerable merit because it indicates the degree of workmanship and a brief description to indicate size, color, material, etc. If certain general descriptions are listed on the specifications, they should be included in the brand specified.
- c. Complete Description - The complete description specification should be used when large quantities of exact requirements have significance. Such specification requires considerable research and knowledge on the part of the writer to ensure that needed characteristics or qualities have been included. When a formal bid is required, a complete and detailed specification should be prepared.

3. BIDDING

The third step in the procurement function concerns receiving bids. The Kentucky Revised Statutes, court decisions and opinions of the Kentucky Attorney General, direct school districts to follow certain procedures in the purchase of materials and services. Though many statutes regulate purchasing, the most important of these are the Model Procurement Code KRS 45A and KRS 424.260 Section 2. KRS 424.260, Section 2 states: "Except where a statute specifically fixes a larger sum as the minimum for a requirement of advertisement for bids, no city, county or district, or board of commission of a city or county, may make a contract, lease or other agreement for materials, supplies and equipment (except perishable meat, fish and vegetables) or for contractual services other than professional, involving an expenditure of twenty thousand dollars (\$20,000) without first making newspaper advertisement for bids. Provided, however, that this requirement shall not apply in an emergency if the chief executive officer of such city, county or district has duly certified that an emergency exists, and has filed a copy of such certificate with the chief financial officer of such city, county or district".

For bidding to be of the greatest benefit to a school district, the school district must be careful to adopt business practices and methods that conform to legal requirements. This means writing bid conditions and specifications, which are in the best interest of the district, and securing sealed bids for those materials and services,

which, are to be purchased. Efforts should be made to secure a minimum of at least three (3) bids to ensure more competition and better prices.

WHEN TO BID

If it can be determined that items or categories of items will exceed a cost of \$20,000, then these items should be bid. Such items must be bid even if the items purchased will be delivered to more than one location within the district so long as, collectively, the purchase to be made exceeds or will exceed \$20,000.

When a lack of storage facilities or other circumstances make it impractical to receive the total quantity at one delivery, the conditions in the bid may specify staggered deliveries. Although, in such instances, it would probably be better from a record keeping standpoint to bid the item(s) more than once a year, thereby allowing one check per contract period.

METHODS OF SECURING PRICE INFORMATION

1. Telephone or Verbal Quotations - This is least desired and should be used only in rare situations when goods and services are urgently needed. At least two (2) quotations are recommended and they should be kept on file.
2. Written Quotations - These are frequently used to secure prices on small quantity purchases and items of limited competition. At least two (2) quotations are recommended and they should be kept on file.

Note: The above described quotations would not qualify as methods for securing prices where formal sealed bids are required by law.

3. Formal Sealed Bids - This method is the most commonly used in Kentucky school districts. Sealed bids should provide for:
 - a. Complete specifications and terms or conditions.
 - b. Prompt return, normally within two (2) weeks.
 - c. At least three (3) prospective bidders.

- d. Advertisement of the bids in accordance with KRS 424.130(b) and provision for public opening at a designated date, time and place.
4. Negotiated Prices - While not frequently used in the procurement of supplies and materials for school systems, they may be utilized to obtain service contracts in which the full extent of work or the materials required is unknown, and the specifications cannot be predetermined.

GENERAL BID CONDITIONS

The general stipulations, which govern bid procedures, should clearly be defined. A formal proposal or invitation to bid should include:

1. General conditions and requirements.
2. The basic specifications.
3. Bid form.

It is important to state conditions under which the school district will receive bids. The general conditions should consider any or all of the following:

1. Name and quantity of the items being bid.
2. Date, time and place bids are to be received and opened.
3. Directions as to where bid invitations and bid forms may be obtained.
4. Requirements for bid security and/or bid bonds.
5. Instructions for signing of the bid forms.
6. Tax exemption statement, if applicable.
7. The basis for acceptance of alternate bids.
8. Delivery instructions.
9. Trade-in terms, if applicable.
10. Instructions on how to fill out the bid forms.
11. Requirements as to samples.
12. Instructions regarding the purchase of foreign made items.

13. How contracts are to be awarded.
14. Pricing instructions such as, unit price, all or none basis, or by groups. (Procedures for price increases must be spelled out.)
15. Length of time bid price is to remain firm.
16. Or equal clause.
17. A statement that the local Board has the right to accept or reject all proposals.

CONTRACTS AND PURCHASE ORDERS

The school district should provide the vendor with a written contract or purchase order which lists all aspects pertaining to the purchase of items as shown. The award should be made to the lowest responsible bidder meeting all specifications. In cases where formal bids have been received, official action by the Board should precede such award and preparation of the purchase order. The typed purchase order should show complete specifications for each item listed, or if this is too lengthy, a statement should be included to the effect that, "The materials and services furnished herewith will be in accordance with the specifications and conditions as listed on Bid Number...". If all information is not shown on the purchase order, be sure that the requisitioner has a copy of the complete bid proposal, including specifications for checking receipt of materials ordered.

Follow-up Procedure

Contract with the vendor may need to be made to ensure expected delivery dates. Follow-up is especially important when late delivery of materials may hinder the school program. An efficient follow-up procedure should include the assignment of responsibility to a designated individual, special purpose forms, a tickler filing system and prompt advice of material receipts.

Receiving Procedure

The requisitioner is responsible for the proper receipt of goods and services, if such material is designated for delivery to him/her. Immediately upon receipt, goods and services should be checked for condition, quality and quantity as stated on the contract or purchase order. This function can be accomplished by having the packing list or invoice signed, or completion of a preprinted receiving ticket, either of which may be forwarded to the central office for substantiation of delivery. The supplier's invoice may then be processed for payment.

Quality Control and Testing

The official having purchasing responsibility should check to make sure items purchased conform to the standard of quality desired. This can be done by any combination of the following methods:

1. Comparative sample.
2. The use test.
3. Laboratory test and analysis.

It is important to note, at this point, that the best specifications and bid procedures are meaningless unless deliveries are in full compliance with the specifications and/or purchase order. Deliveries, therefore, must be certified before payments can be made and care should be exercised to ensure that the items received are those ordered.

CHECK POINTS FOR INSPECTION AND QUALITY CONTROL

Some suggested guide points to be observed are:

1. Check for accurate count.
2. Sampling and testing if deemed necessary.
3. Check for breakage or shortage.
4. Compare items received against the specifications on the purchase order or the bid contract; and if a laboratory test is required, make arrangements immediately and advise the parties concerned.

PAYMENT PROCEDURE

The final step in the procurement function is to pay the correct amount for the items purchased and received in accordance with the contract or purchase order. In all instances, cash discounts should be taken, if applicable. The basic steps in the procurement function and the responsibility for action are as follows:

1. Requisitioning - Initiated by the user, sent to the official charged with purchasing responsibility and copy retained by the school.
2. Specifications - Prepared in detail setting forth minimum acceptable physical characteristics as well as terms and conditions relating to delivery and performance.

3. Bids or Quotations - Received, checked and tabulated by the central office and recommendations for formal award made to the Board of Education.
4. Contract or Purchase Order - Signed by the designated Board official or Superintendent.
5. Follow-up - Expediting done to ensure delivery on time.
6. Receiving - The requisitioner signs receipt or delivery ticket and sends to the central office indicating quantity and quality of material received.
7. Quality Control and Testing - The method of checking to see that items purchased comply with the specifications.
8. Invoice or Proof of Payment - Approved by the person requesting material or service and forwarded to the treasurer for payment.

CHAPTER 8

BUS INSURANCE

LEGAL REQUIREMENTS

The following Kentucky Revised Statutes requires the Local Education Agency to buy insurance for school buses:

KRS 160.310 Board to Provide Insurance for School Buses

Each local Board of Education may set aside funds to provide for liability and indemnity insurance against the negligence of the drivers or operators of school buses, other motor vehicles and mobile equipment owned or operated by the Board. If the transportation of pupils is left out under contract, the contract shall require the contractor to carry indemnity or liability insurance against negligence in such amount as the Board designates. In either case, the indemnity board or insurance policy shall be issued by some surety or insurance company authorized to transact business in this state and shall bind the company to pay any final judgment not to exceed the limits of the policy rendered against the insured for loss or damage to property of any school child or death or injury of any school child or other person.

The following Kentucky Administrative Regulation sets the guidelines and requirements for bus insurance:

702 KAR 5:030 - Liability Insurance for Buses

Section 22. A local board of education that owns, operates, or contracts school buses that transport the district's pupils to and from school shall purchase liability or indemnity insurance for these school buses. The coverage limits shall be set by the Department of Education.

Section 23. If there are pupils transported on school buses or other vehicles contracted to the board, the board shall enter into an agreement with the contractor to secure fleet rates for liability or indemnity insurance for these vehicles.

Section 24. The Kentucky Standard School Bus Endorsement, which is furnished by the Commissioner of Education to insurers who have been awarded school bus insurance coverage shall

be attached to and become part of the school bus insurance contract after having been signed by an official of the insuring company having the proper corporate authority.

There are four (4) essential items that one must remember from reading the KRS's and KAR's. These items are:

1. LEA's must insure their bus fleet with liability insurance.
2. Liability: a debt of responsibility; an obligation, which may arise by a contract made or a tort committed.
3. LEA's must insure all contract carriers that transport children.
4. LEA's must insure their bus fleet and contract carriers with the benefits prescribed by the Department of Education. Once coverage has been obtained, the Kentucky Standard School Bus Endorsement must be signed by an authorized official of the insuring company and attached to the basic contract.

VEHICLE TYPES

The Department of Education reimburses the LEA's for insurance coverage. However, the Department of Education does not reimburse local LEA's for the cost of non-pupil transportation related vehicles. Therefore, the following definitions are used to determine which insurance will be reimbursed. Vehicle definitions for insurance reimbursement are:

1. School Buses - Vehicles designed to carry ten (10) or more passengers to and from school or school activities, which meet the KENTUCKY MINIMUM SPECIFICATIONS for school buses.
2. Other Student Carriers - Vehicles owned or contracted by the Board designed to carry less than nine (9) passengers and are used to transport pupil in special situations.
3. Service Vehicles - Vehicles directly related to the pupil transportation program.
4. Vehicles Not Related to Pupil Transportation - Vehicles owned by the Board but are not used in the transportation of pupils. (e.g. driver education vehicles, vans, service vehicles; and vehicles not related to transportation such as: tractors, bulldozers, 4-wheel drive vehicles and administrative vehicles.)

It is very important that these four (4) classifications of vehicles be remembered. Knowledge of these four (4) classifications is needed when filling out the "Invitation to Bid on School Transportation Insurance Forms".

MINIMUM COVERAGE LIMITS

The Department of Education, Division of Audit and Transportation Services, have set the following Minimum Coverage Limits:

School Buses

- Property Damage Each Accident\$ 100,000
- Bodily Injury Liability Per Person\$ 250,000
- Bodily Injury Liability Per Bus Load \$2,000,000
- Uninsured Motorist Coverage Allowable Limit Per Person Per Accident
- “No Fault” Coverage Per Person \$ 50,000

Other Student Carriers

- Property Damage Each Accident \$ 100,000
- Bodily Injury Liability Per Person \$ 250,000
- Bodily Injury Liability Per Bus Load \$ 1,000,000
- Uninsured Motorist Coverage Allowable Limit Per Person Per Accident
- “No Fault” Coverage Per Person\$ 50,000

If your district decides to bid “single limit coverage,” the Department of Education, Division of Audit and Transportation Services, has set \$2,000,000 as the minimum. The single limit coverage is applied to the total bodily injury and/or property damage claim. Meaning, that for any accident there would be no separation of coverage from bodily injury and property damage, all claims up to \$2,000,000 would be combined and paid.

CONTRACT AND PRIVATELY OWNED CARRIER ENDORSEMENT

Endorsements are needed for contract or privately owned carriers; these endorsements must be on file in the Board’s central office. The procedure to follow with contract drivers is as follows:

1. Have the contract driver fill out the appropriate form.
2. Send a copy of the completed form to your insurance company and/or insurance agent.

3. When a change in contract or privately owned carrier occurs, you should:
 - a. Contact your insurance company and/or insurance agent to give them the following information.
 - Name of driver to be added, make and type of vehicle and vehicle serial number.
 - Name of driver to be deleted, make and type of vehicle and vehicle serial number.
 - b. Have drivers fill out the necessary forms, file the contract endorsement and send a copy to your company.

INSURANCE FOR OTHER BOARD VEHICLES

At the time your district bids its bus fleet insurance, your district might consider bidding all Board vehicles as one (1) package. This can be done in one (1) of two (2) ways.

Bid all vehicles at Department of Education, Division of Audit and Transportation Services minimum standards, or bid non-pupil transportation vehicles at the minimum financial responsibility standards. To bid non-pupil transportation vehicles this way, just add an addendum to your bid that states all non-pupil transportation vehicles will be covered for the following amount. Since the Department of Insurance's minimum standards change frequently, to find the minimum requirements when your district bids its vehicle insurance, you should contact the following:

Department of Insurance
State Risk and Insurance Service
Frankfort, KY 40601
(502) 564-6055

ADDITIONAL COVERAGE "OTHER" PURCHASES

Leased Car Insurance

This coverage is for vehicles leased by the Board and used by Board employees.

Collision Coverage

Collision Insurance covers damage to the Board's vehicles caused by collision or upset, regardless of who is to blame for the accident. The policyholder can request a deductible, that portion of the damage the Board pays.

Comprehensive Coverage

Comprehensive insurance covers damage to the Board's vehicles from losses other than by collision or upset. Comprehensive losses result from fire, theft, vandalism, flood, falling objects, colliding with a bird or animal, etc. Glass breakage is included under comprehensive coverage. If this coverage is purchased with a deductible, that deductible cannot apply to glass breakage in the windshield, doors and windows and the glass or other materials used in the lights required on automobiles.

OBTAINING COVERAGE

The Department of Education (Division of Audit and Transportation Services) strongly recommends that all districts bid their fleet insurance. In obtaining fleet coverage, the following steps should be followed:

1. One hundred and twenty (120) to ninety (90) days before your district's coverage is to expire, start procedures to bid insurance. Preliminary procedures include:
 - a. Update and complete Part III of the "Invitation to Bid on School Transportation Vehicle Insurance."
 - b. Complete Part I of the "Invitation to Bid on School Transportation Vehicle Insurance."
 - c. Decide what riders or addendum's to add to your policy (e.g. Hired Car Insurance or state minimum coverage standards for non-pupil transportation vehicles).
2. Once Parts I and III are completed, sixty (60) to eighty (80) days before coverage is to expire, your district should advertise for bid, in accordance with existing laws and regulations, utilizing newspapers with large circulation. Give the name and address of the local Board plus a contact person and telephone number.
3. Once bids are solicited, give all bidders at least thirty (30) days to respond but make sure bids are returned at least thirty (30) days before you present coverage expires.
4. Once bids are returned, have a public opening of bids to record quotes. Also, analyze the bids to make sure each bidder covered what you requested. Pay particular attention to the exclusion section of the policies.

SOURCES OF INFORMATION

If questions should arise during the year concerning fleet insurance, the following numbers can be called to obtain assistance:

Questions concerning BUS SPECIFICATIONS:

Division of Audit and Transportation Services

Transportation Services Branch

(502) 564-4718

Questions concerning BUS BIDDING PROCEDURES AND GENERAL INSURANCE questions:

Division of Audit and Transportation Services

Transportation Services Branch

(502) 564-4718

Specific questions concerning INSURANCE:

Department of Insurance

State Risk and Insurance Services

(502) 564-6055

CHAPTER 9

ACCOUNTING AND REPORTING

KRS 157.370 sets forth the basic statutory framework by which local school districts are to be reimbursed from the fund to Support Educational Excellence in Kentucky (SEEK) for transportation costs. 702 KAR 5:020, Program Cost Calculation, sets out the method and steps for completion of the district's transportation program cost calculation.

TRANSPORTATION FUNDING FORMULA

Pupil transportation funding, under the Kentucky SEEK, is based on a cost/density formula. Number of pupils transported per square mile served and the actual cost are the basis for determining transportation allotments. The intent of the transportation formula is to pay school districts for their public school pupils who live one mile or more from school (T-1 pupils) on the basis of what the average cost of T-1 pupils is for districts having similar transported pupil density. The basic premise of this program is that districts with equal transported pupil density per square mile of areas served should have approximate equal costs per pupil per day. For example, it would be expected that a district transporting twenty (20) pupils per square mile would have a lower cost per pupil than a district transporting only five (5) pupils per square mile. Facts attest to the basic validity of this premise. Consistently, over the years, smooth graphs have been constructed showing that, on the average, as transported pupil density increases, cost per pupil decreases.

Allocating state funding for pupil transportation on the basis of average cost adjusted for density provides an incentive for efficiency by local school districts. If actual cost per pupil is less than the predicted cost, the district gets a "bonus" for effective operations. If it is larger, they must provide more local funds. The formula causes administrators to compare their operations with districts having a similar density to identify possible cost savings.

Two (2) calculations are made each school year to determine each school district's allotment for transporting pupils to and from school, and are distributed to local districts by the Department of Education.

The first calculation, "Pupil Transportation Tentative Calculations," provides school districts with specific information concerning the method by which each district's formula adjusted

transportation cost is calculated. The formula adjusted cost serves as the basis for making each district's final cost calculation for transportation.

The second calculation, "Pupil Transportation Growth and Final Calculation," shows each district's calculation for growth in (T-1) pupils and the final calculated pupil transportation costs. The final calculated cost serves as the basis for state allotments to districts for providing transportation service.

FACTORS AFFECTING THE FUNDING FORMULA

Transporting Expenditures

Pupil Transportation costs used in the transportation formula are taken from each district's "Annual Financial Report - Financial, Form F-55", as submitted to the Department of Education. Expenditures for to and from school pupil transportation services are recorded under the 2700 Series in the MUNIS Accounting System.

Receipts

Reimbursements for the cost of transportation from sources other than the SEEK allotment where the expenditures have been recorded in the transportation account are deducted from the total transportation cost used in the transportation formula. These reimbursements can come from local, state and federal sources. It is very important that they are recorded in the proper receipt codes.

Density

The density factor used in the transportation cost formula is obtained by dividing the average daily number of pupils transported by the square miles served in each school district. Average daily attendance transported is taken from each District's Annual Statistical Report as submitted to the Pupil Personnel Branch. Square miles served are taken from the bus route maps submitted by each school district each year.

Bus Depreciation

Whenever a school district purchases a school bus that meets the "Kentucky Minimum Specifications for School Buses," the district is eligible for reimbursement for the cost of the bus

through the annual depreciation schedule. The amount to be added to a district's transportation program cost for vehicle depreciation is determined as shown in the following table.

<u>YEARS</u>	<u>DEPRECIATION RATE</u>
1 - 2	12% of the state bid price
3 - 8	10% of the state bid price
9 - 10	8% of the state bid price
11 - 14	6% of the state bid price

Whenever a school district purchases a used school bus of a model year that would place it within the depreciation schedule, the depreciation amount will be based on the purchase price and calculated for each year for which the bus remains within the applicable depreciation schedule. In no case can the annual amount of depreciation calculated for a used school bus exceed the amount calculated for a bus of the same model year and capacity that was purchased now through the state bid price contract plan. The annual depreciation for a new school bus purchased by local bid cannot exceed the amount calculated for a bus of the same capacity and model that was purchased new through the state bid price contract plan.

Any new or used school bus purchased by a local Board of Education, company or individual cannot be used to transport pupils to and from school or related events until it has been approved by the Division of Audit and Transportation Services as meeting the "Kentucky Minimum Specifications for School Buses" in effect on the date of manufacture.

Anytime a school district purchases a school bus, contracts for a bus, or disposes of a bus, it shall update its school bus inventory, which is maintained by the Pupil Transportation Branch.

VOCATIONAL TRANSPORTATION REIMBURSEMENT

KRS 157.370 (8) requires a local school district to be reimbursed separately from the SEEK Program for the cost of transporting pupils from a parent school to a vocational-technical school or to a vocational education center. 702 KAR 5:110 establishes the terms under which reimbursement will be paid to those districts that transport their secondary school pupils to vocational school or vocational training sites and establishes the reimbursement limits. At the beginning of each school year, school districts will receive an "Application to Receive Reimbursement for Transporting

Pupils to Kentucky Vocational Schools” (Form VT-1), which must be completed and submitted to the Division of School Finance if the district provides vocational transportation. The division will approve all applications for transportation to vocational schools located one-half (1/2) mile or more from the parent school or to vocational training sites located one-half (1/2) mile or more from the vocational training school. A vocational training site can be described as a place other than a vocational school where pupils receive “hands-on” training as a part of their basic vocational instructional program. For example; carpentry, masonry and electrical classes may be involved in building a structure located several miles from the vocational school, or health career classes may require regular transportation to a hospital for training. Funding is not available under this program for reimbursement for the cost of field trips for vocational classes such as tours of industrial facilities, medical facilities, construction sites, etc. Such trips will not be approved for reimbursement.

For each calendar month that a district provides vocational transportation, a “District’s Monthly Claim” (Form VT-2) must be submitted to the Division of Funding & Data Analysis in order for the district to receive reimbursement. The monthly claim form certifies the number of days pupils were transported to each vocational school or vocational training site, and the average number of pupils transported each day. Based on this information and the figures submitted on the district’s application, the division will calculate the amount of reimbursement the district should receive for vocational training.

Reimbursement for vocational transportation will be based on the average cost per mile for county school districts, including the driver’s cost, for the previous school year and the district’s hourly pay rate for drivers in the regular transportation program.

DEAF AND BLIND TRANSPORTATION REIMBURSEMENT

KRS 157.280 (4) requires each local school district to provide for transportation of its resident pupils who are enrolled in the Kentucky Schools for the Deaf or Blind, as resident pupils, to and from school on a regularly scheduled basis, at intervals of not less than once per week. A separate appropriation has been provided for reimbursement of school districts for the cost of this transportation. KRS 157.280 (5) allows each school district to provide for transportation of its resident pupils who are enrolled in the Kentucky Schools for the Deaf or Blind as day school pupils, to and from school on a daily basis. This law also requires the state to reimburse school districts for this

daily transportation from foundation program transportation funds at the same rate per trip that is calculated for resident pupils.

Kentucky Administrative Regulation, 702 KAR 5:120, establishes the method for determining the rate of reimbursement for providing transportation for pupils enrolled in the Kentucky Schools for the Deaf or Blind.

Near the end of each school year, the Division will provide each school district with the necessary forms for certifying to the Commissioner of Education the number of trips it provided for each child enrolled in the Kentucky Schools for the Deaf or Blind.

REPORTING

Incident Reports. The following Kentucky Administrative Regulation relates to reporting school bus accidents.

702 KAR 5:030. Pupil Transportation: Section 3. The superintendent shall make reports annually to the Department of Education on all school bus incidents that occurred during the year. Incidents involving serious student injury or fatality or failure of safety equipment shall be reported to KDE immediately. KDE shall then distribute this information to all districts.

Personal injury or fatality to:

- Occupants in the bus (pupils, drivers, or other persons).
- Occupants of any other vehicle involved in the incident.
- Non-Occupants of the bus or other vehicle (pupils in the loading or unloading zone, pedestrians, bystanders, etc.).

The following forms should be used when reporting accidents:

2500-1015 8-87 - School Bus Incident Report. To be used to report any school bus related incident, which meets the above conditions.

Reporting of Fatal School Bus Incidents to the Division of Audit and Transportation Services, Transportation Services Branch. Any school bus related incident resulting in a fatality

should be reported as soon as possible, by telephone, to the Transportation Services Branch at (502) 564-4718.

Reporting of Fatal School Bus Incidents to the National Response Center. When a school bus collision results in the fatal injury of one or more school bus occupants, or bus occupants are injured so critically that death seems imminent, the investigating police agency should report the collision as soon as possible, by telephone, to the National Response Center in Washington DC at (800) 424-8802 or 8803.

The National Highway Traffic Safety Administration (NHTSA) will dispatch an incident investigation team to each incident selected for investigation. Prompt notification of the National Response Center about each such collision will be appreciated. It is desired that investigators have an opportunity to examine the incident site, the involved vehicles and their occupants before perishable information at the scene has been destroyed. The police agencies having jurisdiction are not expected to “hold” the scene of the incidents for the Federal incident investigation team. The team will not interfere with or supersede the agency having original jurisdiction. It is desired that this will be a cooperative effort.

INSTRUCTIONS FOR USING THE SCHOOL BUS INCIDENT REPORT FORM

Purpose

To compile accurate, uniform and reliable information about school bus incidents so that problems and trends can be identified and needed safety programs can be developed.

Information you provide in this Uniform School Bus Incident Report Form will be required to complete the National Safety Council’s “Annual Summary of School Bus Incidents.” Please answer every question and promptly file this report with the proper state authorities.

Who should complete this form:

The person designated by state or local jurisdiction.

This form should be filled out WHETHER PUPILS ARE PRESENT OR NOT if the incident you are reporting involves ANY amounts or property damage, personal injury or fatality to:

- Occupants in the bus (pupils, drivers, or other persons).
- Occupants of any other vehicle involved in the incident.
- Non-Occupants of the bus or other vehicle (pupils in the loading or unloading zone, pedestrians, bystanders, etc.).

Definitions

Incident: That occurrence in a sequence of events, which usually produces unintended injury, death or property damage.

9-6

Bus: A motor vehicle with motor power, except a trailer, designed for carrying more than nine (9) persons. (Code of Federal Regulations, Title 49, Transportation.)

Driver: The person driving the school bus.

Intersection: An area which: (1) contains a crossing or connection of two or more roadways not classified as driver access; and (2) is embraced within the prolongation of the lateral curb lines or, if none, the lateral boundary lines of the roadways. Where the distance along the roadway between two (2) areas meeting these criteria is less than ten (10) meters (or 33'), the two (2) areas and roadway connecting them are considered to be part of a single intersection. (Classification of Motor Vehicles Traffic Incidents, ANSI D16.1, American National Standards Institute.)

Loading and Unloading Zone: Any place the school bus stops to load or unload pupil passengers.

Pupil: A person who attends an educational institution.

School Bus: A bus is sold, or introduced in interstate commerce, for purposes that include carrying students to and from school or related events, but does not include a bus designated and sold for operation as a common carrier in urban transportation (Code of Federal Regulations, Title 49, Transportation).

There are four (4) types of school buses:

1. Type A - A conversion body constructed and installed upon a van-type compact truck or front section vehicle, with a gross vehicle weight rating of 10,000 pounds or less designed for carrying more than nine (9) persons.
2. Type B - A conversion or body constructed and installed upon a van of front sectioned chassis, or stripped chassis, with a gross vehicle weight rating of more than 10,000 pounds, designed for carrying more than nine (9) persons. Part of the engine is beneath and/or behind the windshield beside the driver's seat. The entrance door is behind the front wheels.
3. Type C - A body installed upon a flat back cowl chassis with a gross vehicle weight rating of more than 10,000 pounds, designed for carrying more than nine (9) persons. All of the engine is in front of the windshield and the entrance door is behind the front wheels.
4. Type D - A body installed upon a chassis, with the engine mounted in the front, mid-ship, or rear, with a gross vehicle weight rating of more than 10,000 pounds, designed to carry more than nine (9) persons. The engine may be behind the windshield and beside the driver's seat; it may be at the rear of the bus, behind the rear wheels; or mid-ship between the front and rear axles. The entrance door is ahead of the front wheels.

Other: Any other person.

APPENDIX A

KENTUCKY

ADMINISTRATIVE

REGULATIONS

SEE YOUR KENTUCKY ADMINISTRATIVE REGULATIONS BOOKLET

CONTAINING REGULATIONS, PROMULGATED BY ADMINISTRATIVE AGENCIES OF
THE COMMONWEALTH OF KENTUCKY PERTAINING TO KENTUCKY SCHOOLS AND
PUPIL TRANSPORTATION.

APPENDIX B

SPECIAL BID CONDITIONS

Savings can be realized by the School Board where competitive sealed bids are received on automotive operational supplies. Just as tires can be purchased through cooperative bids with other local or state agencies, bids may also be received between two or more school districts. By combining similar items and requirements, school districts can receive more favorable prices. Each district, however, should be responsible for separate ordering, delivery, and payment of invoices under this method of purchasing. There are definite price advantages where items can be purchased in bulk or large quantities. Many times, operational supplies can be reduced substantially by purchasing in bulk quantities. For example, fuel delivered in 8,000 gallon tank trucks is considerably more economical than the same product delivered in smaller containers. The price per gallon for lubricating oil is also much less for a 55 gallon drum than in quart containers.

Fuel Special Bid Conditions

Gasoline can be purchased either from the state bid price or bid by the district itself. If bid by the district, care should be taken to assure that all bids received are for a firm price for the full term of the contract.

FUEL SPECIAL CONDITIONS

1. The contract established from this sealed bid shall be for the period of one year from the contract date.
2. The bidder shall submit a price, which is to be stated as the Terminal Cost, plus a differential cost which together shall constitute the Wholesale Terminal Cost. F.O.B. Terminal the date delivery is made.
3. The bidder at the time of submission of this bid shall furnish proof of the terminal cost.

4. If given a contract, the bidder agrees to provide proof of the terminal cost when submitting an invoice for payment.
5. The differential cost stated on the bid form shall be firm for the period of the contract.
6. The terminal price may fluctuate, but the contractor must submit satisfactory proof of the terminal price prior to the payment of any and all invoices.
7. No shipments shall be made on the contract except upon receipt by the contractor of an official order from the _____ Board of Education.
8. It is herein set forth that any and all quantities mentioned in this invitation are purely estimates, and are not to be implied nor inferred as being guarantees to purchase on the part of the _____ Board of Education. The school system is obligated to purchase only that quantity needed during the term of the contract.
9. The majority of fuel deliveries will be requested in transport load. It is estimated _____ gallons of gasoline and _____ gallons of diesel fuel will be requested from _____, 20 _____, until _____, 20 _____. Transport load will make up _____ gallons of this total with _____ gallons to be by tank-wagon.
10. The minimum delivery of fuel to any location shall be _____ gallons of any one type of fuel unless the bidder agrees to deliver lower quantities.
11. Gasoline fuel specifications
 - A. Gasoline purchase shall meet the Society of Automotive Engineers requirements SAE J312d.
 - B. Volatility Index (List here the dates and volatility requirements that will be in effect during the contract.) (General RVP of 10)
 - C. Alcohol additive is not acceptable.

- D. The minimum octane rating for unleaded gasoline shall be 87. (Check to be sure that octane rating is compatible with engine requirements.)
- E. Each bidder shall bid to furnish only the company's own "House Brand" Unleaded gasoline. The gasoline shall be the same high grade and quality that the company sells at its company owned and leased service stations.
- F. Bids on the delivery of second or third grade "trackside," "terminal drop," or "industrial engine gasoline" will not be considered.

12. Diesel fuel specifications.

- A. Diesel fuel purchased shall be completely distilled material and shall meet the ASTM designation D-975 Grade Z-D.
- B. The fuel shall not contain more than 0.05% sulfur.
- C. The cetane number shall be a minimum of 40.0.
- D. The carbon residue (10% residuum), mass % max shall be 0.35.
- E. Water and sediment, % by vol. Max shall be 0.05.
- F. Ash, % by wt. max shall be 0.01.

13. Gasoline shall not be tied in with, or contingent upon, the purchase of motor oil, lubricants, or other items or services.

The successful bidder shall agree that if the Board of Education, through scientific analysis, (NOTE: require successful bidder to provide for a minimum number of tests at suppliers expense and additional tests at buyer expense.) finds that the fuel being delivered does not meet specifications, and if after sufficient notice of same, has been given to remedy the deficiency, and on subsequent analysis, a similar condition if found to exist, the Board of Education, at its discretion, may cancel the contract, and said cancellation shall be without

recourse to the successful bidder. In addition, the company involved will be removed from the official bid roster.

15. The established contract shall be non-cancelable during its life except for mal-performance, non-performance, substitution of commodity or other failure to comply on the part of the bidder. In the event of such action being necessitated, the contract shall be null and void immediately upon receipt of a notarized written notice signed by the Board of Superintendent or his designee. Said cancellation shall be without recourse to the successful bidder. In addition, the company involved will be removed from the official bid roster.
16. The successful bidder shall agree that if, at any time, deliveries of fuel cannot be made because of a strike, shortage of product, or breakdown in transporting facilities, that the Board of Education may purchase fuel on the open market without regard to this contract.
17. The successful bidder will be required to make delivery within 24 hours after receipt of an order. Failure to comply will result in cancellation for failure to deliver caused directly by fire, flood, strike, act of God, act of the Government or any other circumstances which, in the Superintendent or his designee's opinion, is beyond the control or fault of the contractor shall not be cause for cancellation.
18. In the event the successful bidder is not able to resume delivery of the product(s) within 30 calendar days, then this contract shall be considered null and void any new bids shall be advertised for and accepted.
19. Resumption of deliveries within 30 calendar days, by the successful bidder will result in no penalty to the bidder, nor will such resumption alter any of the contract's terms or conditions.
20. Pumping and metering (including metered delivery tickets) are required for all deliveries. Additionally, the successful bidder shall agree than in order for a delivery ticket to be valid,

both the filled and emptied tanks of all the transport trucks are to be inspected by the person signing the delivery ticket.

21. Deliveries against this proposal shall be free of federal excise taxes. Excise tax exemption number may be used when required.
22. All bids will be evaluated and awarded on NET PRICES. Discounts for prompt payment will not be a consideration in making the award.
23. Modifications, additions, or changes to the terms and conditions of this invitation for bid may be cause for rejection of your bid. All bids shall be entered on these official forms. Bidders who attach or submit bids on their own company forms shall be rejected.
24. All bid forms must be signed by an officer or member of this bidding firm who is authorized to legally bind the firm.
25. This bid shall be binding upon the bidder for 45 calendar days following the bid opening date.
26. Prospective bidders are expected to visit the various delivery sites to determine if any special equipment or procedure will be required to properly service the account. The submission of a bid will be considered as conclusive evidence that the bidder has made such examination and/or is satisfied as to the conditions to be encountered in performing the work and fulfilling the requirements of the contract.
27. All deliveries shall be made between the hours of 8:00 a.m. and 4:00 p.m., Monday through Friday.

SAMPLE OIL AND LUBRICANTS BID

1. Oil and lubricants shall not be tied in with, or contingent upon, the purchase of fuel or other products or services.
2. The oil and lubricants requested in this invitation are to be packaged in clean factory-sealed drums.
3. Bidders are requested to bid by units indicated on the bid forms. In this case, price per drum. No other unit bid will be accepted.
4. Awards will be made on the basis of the lowest bid price for items that meet bid conditions and specifications.
5. Unless otherwise specified, brands and specifications referenced herein are meant to establish a minimum standard of quality only. Bidders may bid brands they consider to be equal by marking through the specified brand and inserting the brand name, model number, etc., on which they are bidding. Bids offering “equal” products will be considered for award if such products are clearly identified in the bid and are determined by the Board to meet or exceed fully the minimum essential specifications and salient characteristics referenced in this bid invitation. Products, which fail to meet minimum essential requirement will be rejected.
6. Bidders proposing alternate brands should enclose descriptive literature with their bids so that the equality can be verified. Failure to enclose sufficient literature may result in rejection of the bid.
7. If a brand or trade name product is not referenced in this bid invitation, bidders should enclose descriptive literature with their bids so that equality with specifications can be verified. Failure to enclose sufficient literature may result in rejection of the bid.

8. When specified brand name is not changed, it will be assumed that the bidders are furnishing those brands. The contracts will be written accordingly and the successful bidders will be required to deliver the brand names.
9. Bidders will be required to submit a sample for evaluation on 24 hours notice if requested by the purchaser.
10. Each drum shipped shall be marked to show the purchase order number.
11. Bid prices shall remain firm for 45 calendar days from the date of the award by the Board of Education.
12. If it should become necessary for the purchaser to place a toll or long distance telephone call regarding complaints, adjustments, shortages, failure to deliver, etc., in connection with this contract, the vendor shall bear the expense of all such calls.

SAMPLE REPAIR PARTS BIDS

Repair Parts Special Conditions

When purchasing school parts, the following factors should be considered:

- Price
- Durability
- Quality - Original equipment or will parts fit.
- Availability - Emergency need or for stock.
- Telephone expense - Long distance, local or toll free.
- Warranty - When you have problem, how well it is handled.
- Return Policy - When part is not needed.
- Obsolescence - Old inventory return.
- New or remanufactured parts as substitute.
- Expertise of people selling parts to make recommendations.

SPECIAL CONDITIONS REPAIR PARTS

1. Purchasing will be from July 1, through June 30.
2. Bidder may bid discounts. No bid will be acceptable, however, unless the original price list from which the discount is taken is included with the bid form at the time the bid form is submitted. Failure to comply with this condition will result in the rejection of the bid.
3. Awards will be made on the basis of the lowest bid price for items that meet bid conditions and specifications.
4. Bidders are requested to bid each item at a price that will be acceptable even though it is the only item awarded. Combination and all-or-none bids will be considered only if combination and all-or-none bids are lower than the bids submitted on a per item basis.

5. Unless otherwise specified, brands and specifications referenced herein are meant to establish a minimum standard of quality only. Bidders may bid brands they consider to be equal by marking through the specified brand and inserting the brand name, model number, etc., on which they are bidding. Bids offering “equal” products will be considered for award if such products are clearly identified in the bid and are determined by the Board to meet or exceed fully the minimum essential specifications and salient characteristics referenced in this bid invitation. Products which fail to meet minimum essential requirements will be rejected.
6. Bidders proposing alternate brand must prove that their alternate meets or exceed the standard, and shall enclose descriptive literature with their bids so that the quality can be verified. Failure to enclose sufficient literature may result in rejection of the bid.
7. If a brand or trade name product is not referenced in this bid invitation, bidders shall enclose descriptive literature with their bids so that equality can be verified. Failure to enclose sufficient literature may result in rejection of the bid.
8. When specified brand names are not changed, it will be assumed that the bidders are furnishing those brands. The contracts will be written accordingly and the successful bidders will be required to deliver the brand named.
9. Products and equipment to be furnished must be new and current models.
10. The manufacturer’s most favorable warranty offered to preferred customers shall apply to all items. A copy of such warranty shall be furnished to the agency upon delivery of the project or equipment or equipment.
11. Bidders must bid by units indicated on the bid form. For example, when an item indicates “each”, this is an individual item and shall not be bid by dozen, box, hundred, etc. Unit prices must be extended to show total price in the total price column. Bids with totals only, may be rejected as an incomplete bid.

12. Bidders will be required to submit a sample for evaluation on twenty (24) hours notice if requested by the purchaser.
13. Shipping cartons shall be marked to show purchase order number. Packing lists shall indicate all items in the shipping carton.
14. Whenever a bid item is composed of several components, variations or sizes, all components must be quoted in order to receive consideration for the item and all components must be received complete prior to authorization for payment.
15. All prices quoted must include transportation and delivery F.O.B. to _____ at _____, Kentucky. Deliveries shall be made between the hours of 8:00 a.m. and 4:00 p.m., except Saturdays, Sundays and Holidays when Board offices and facilities will be closed.
16. All parts offered for bid under this invitation must meet the minimum standards as set forth in the "Kentucky Minimum Specifications for School Buses," adopted by the Kentucky State Board of Education and required by KRS 156.153.
17. Bid prices shall remain firm for forty-five (45) calendar days from the date of the award by the Board of Education.
18. Payment for bid items are normally approved at the regularly scheduled meeting of the Board of Education on the _____ day of the month provided, the bid items are properly received by _____. Payments may be made early to take advantage of any cash discounts offered with the bid contract, provided that discounts are advantageous to the Board.
19. If it should become necessary for the purchaser to place a toll or long distance telephone call regarding complaints, adjustment, shortages, failure to deliver, etc., in connection with this contract, the vendor shall bear the expense of all such calls.

20. Multiple or alternate bids offering more than one brand or bid price in total (or by line-item) shall be cause for rejection of the bid unless such bids are called for in this invitation.

SAMPLE NEW TIRE AND TUBE BID

Special Conditions New Tires and Tubes

1. You are invited to submit a sealed bid for supplying school bus tires and tubes to the _____ Board of Education according to the conditions and specifications set forth in this invitation.
2. The bid prices shall be firm for forty-five (45) calendar days form date of bid opening.
3. All tires and tubes offered for bid under this invitation must meet the minimum standards as set forth in the “Kentucky Minimum Specifications for School Buses,” adopted by the Kentucky State Board of Education and required by KRS 156.153.
4. Items delivered that do not meet specifications will be returned to the supplier at the supplier’s expense. Decision of the Board of Education shall be final in determining if items have not met specifications.
5. All bidders shall furnish description at the time of submission of their bid to allow verification that the tires and tubes proposed meet all bid specifications.
6. Whenever the tires and tubes are described by the use of a proprietary product or by using the name of a manufacturer of vendor, the term “or approved equal” if not inserted is implied.
7. Bids that exceed the current state purchase price for new tires and tubes will be considered.
8. All bids must be made on the attached forms. Bids are solicited only in the form of discounted unit prices (actual cost to the Board of Education) for the tires and tubes listed.
9. The vendor shall include with his bid the manufacturer’s standard warranty for each type of tire bid. Failure to include the warranties will be considered just cause for disqualification of the bid.
10. Bidder guarantees to make standard adjustments of defective products, if any, and the contract price shall be the basis of such adjustment. The period in which adjustments under

this clause can be made shall extend for six (6) months from date of final delivery or expiration of the contract, whichever is later.

11. Award(s) will be made to that responsible, responsive bidder submitting the lowest cost for the tires and tubes being bid upon. Pricing within five percent (5%) of the low successful bid may result in a multiple contract, if letting more than one contract is determined by the Board to be in its own best interest.
12. The Board of Education is not subject to Federal Excise Tax and a tax exemption certificate will be furnished for all purchases made under this contract. The Board is also exempt from transportation tax and this tax shall not be included in the delivered price of merchandise shipped; nor shall any state sales tax be added.
13. Prices quoted must include transportation and delivery F.O.B. on loading dock as requested on the purchase order. Deliveries shall be made between the hours 8:00 a.m. and 4:00 p.m., except on Saturdays, Sundays and Holidays when the receiving facilities shall be closed.
14. Payments for bid items are normally approved at the second regular meeting of the Board of Education provided the bid items and invoices are properly received by the first regular meeting of the month. However, payments may be made early to take advantage of cash discounts offered with bid contract, provided the discount is advantageous to the Board.
15. If it should become necessary for the purchaser to place a toll or long distance telephone call regarding complaints, adjustments, shortages, failure to deliver, etc., in connection with this bid, the vendor shall bear the expense of all such calls.

SAMPLE VEHICLE BID

1. You are invited to submit a sealed bid for the supplying of vehicles according to the conditions and specifications set forth in this invitation.
2. For convenience and economy of time and expenses in obtaining warranty services, bid consideration will be restriction to bidders maintaining service facilities within a fifty (50) mile radius of _____, Kentucky.
3. Descriptive literature and specifications must accompany all bids and all features must be plainly marked or the bid may not be acceptable.
4. Variations from bid specifications must be clearly marked; those, which are not clearly marked, will not be allowed and the bid may not be considered.
5. Time required for delivery may be considered in awarding the bid.
6. Used vehicles will be offered for trade-in on the new vehicles as indicated in this bid invitation. The vehicles offered for trade-in may be inspected at _____, Kentucky, between the hours of 8:00 a.m. and 4:00 p.m., weekdays. Contact _____, telephone (____) _____ for an appointment to inspect the trade-in vehicles.
7. Possession of the trade-in vehicles will remain with the Board of Education and vehicles may be used as needed until delivery and acceptance of the new vehicles. Possession and title of the trade-in vehicles will be transferred to the successful bidder(s) upon delivery and acceptance of the new vehicles.
8. Bid awards will be made on the basis of the lowest bid prices for vehicles offered, the lowest bid price will be the net price after allowance for the trade-in.
9. Payment for bid items are normally approved at the regularly scheduled meeting of the Board of Education on the _____ of the month provided the bid items and invoices are

properly received by the first _____ of the month. However, payments may be made early to take advantage of cash discounts offered with the bid contract, provided the discount is advantageous to the Board.

10. long distance telephone call regarding complaints, adjustments, shortages, failure to deliver, etc., in connection with this bid, the vendor shall bear the expense of all such calls.

SCHOOL BUS PURCHASE

New Buses

In KAR 5:060, Section 4 - Any new school bus chassis, new school bus body, or complete new school bus purchased by a district Board of Education, individual, company or corporation for use in transporting pupils to and from school and for related purposes shall meet the Kentucky Minimum Specifications for School Buses; Revised, that were in effect on the date of manufacture. Same buses shall not be used for the above stated purposes until they have been approved by the Division of Transportation Services as meeting these requirements.

KRS 156.154. The Commissioner of Education shall make available to all district Board of Education full information regarding established price contract agreements; any or all district Board may procure buses from sources at prices, terms and conditions incorporated in said price contract agreements. Any district Board of Education may initiate its own bids on school buses, which meet the specifications of the Kentucky Board of Education, where price contracts have been established, provided the Commissioner of Education approves the bids and purchase contracts as meeting specifications of the State Board of Education. However, no district Board of Education shall purchase said school buses under the terms of this section unless the Commissioner of Education shall certify that the purchase price is lower than prices set forth in established price contract agreements for similar equipment.

Used Buses

702 KAR 5:060, Section 5 - Any used school bus chassis, used school bus body, or complete used school bus purchased by any district Board of Education, individual, company or corporation for use in transporting pupils to and from school and for related uses shall not be used

for said purposes until is shall have been approved by the Division of Transportation Services as meeting the Kentucky Minimum Specifications for School Buses in effect on the date of its original purchase, and as meeting the used school bus mandatory safety equipment requirements in effect on the date same was purchased in used condition.

DISPOSAL OF SURPLUS PROPERTY

The local board of education has a responsibility to excise good bus business practices in the disposal of surplus property. This is especially true in the sale of school buses declared surplus by local boards of education.

The following recommendations should be followed in the sale of school buses in compliance with local board policies and procedures.

1. No warranty, either expressed or implied shall be made in regard to the use or condition of the vehicle.
2. Every effort must be made to obtain fair market value.
3. Buses shall be sold by properly advertised public auctions or by sealed bids.
4. Buses may be sold to other school districts by obtaining two (2) or more professional appraisals without having to advertise or take bids.
5. All district identification shall be removed from school buses before the title is transferred.
6. Before the board transfers title of the bus to another party other than a Kentucky school district, the stop signal arm and the flashing warning lights shall be made inoperable by disconnection or removal.
7. The Department of Education, Division of Audit and Transportation Services, Transportation Services Branch shall be notified of names and addresses of those purchasing used school buses.

SALE OF SURPLUS SCHOOL BUSES

SAMPLE

INVITATION TO BID ON SURPLUS SCHOOL BUSES

The _____ Board of Education, located at _____, Kentucky is offering _____ surplus school buses for sale by sealed bids. Bids must be submitted to the superintendent on or before _____ o'clock, _____ 20 _____. The board will consider bids at their (special) meeting at _____ o'clock, on _____, 20 _____. This meeting will be held at the _____ Board Office located at _____, Kentucky.

All bidders are welcome to attend.

VEHICLE FOR SALE

<u>YEAR</u>	<u>CHASSIS</u>	<u>MAKE</u>	<u>SERIAL NO.</u>	<u>BODY MAKE</u>	<u>CAPACITY</u>
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CONDITIONS OF SALE:

1. Vehicles are offered without either expressed or implied warranty in regards to use or condition.
2. Buses and maintenance records may be inspected weekdays between 8:00 a.m. and 4:00 p.m. at the district school bus garage located in _____.
3. Bids shall be accompanied by a bid guarantee in the amount of \$_____ for each vehicle desired. Guarantee must be in the form of a cashier's check or certified check made payable to the _____ Board of Education. Guarantees will be returned to unsuccessful bidders.

4. The balance of the bid price will be due and the vehicle must be removed from the _____ Board of Education property within thirty (30) days of written notification of bid awards. Bidders who fail to comply with this condition will be considered in default, the bid guarantee forfeited, the vehicle(s) offered again for public sale, and any bid submitted by the successful bidder, who defaulted on the first sale, will be considered invalid and unacceptable.
5. The bid form must be signed by an individual who is authorized to legally bind the firm or bidder.
6. Balance of payment for any vehicle purchased from the Board of Education is to be by cash, cashier's check, certified check or money order upon delivery. No vehicle may be moved from the _____ Board of Education property until title is transferred.
7. Bidders may submit a total bid for all vehicles.
8. Possession of vehicles cannot be made until two (2) days after the Board of Education has approved the bid and then only upon verification that the successful bidder has transferred the bus title from the board of education to the successful bidder.