

ADMINISTRATIVE PROCEDURE

SAN DIEGO UNIFIED SCHOOL DISTRICT

NO: 4586

PAGE: 1 OF 8

EFFECTIVE: g-04-62

REVISED: 8-17-93

CATEGORY: Instruction, Community Resources

SUBJECT: Instructions for Obtaining Transportation for School-Related Activities

A. PURPOSE AND SCOPE

1. To outline administrative procedures governing transportation arrangements with **district-**contracted, Transportation Services Department, and private vehicles, whether financed by special project, district, or private funds.
2. To provide information and instructions for parents and students who use private vehicles on field trips.
3. To provide instructions for processing the "Field Trip Order/Report Form" ("T-Form").
4. **Trips lasting longer than** one day and requiring arrangement of overnight services are specifically excluded from this procedure (see Procedure No. 4585).
5. **Related Procedures:**

| | |
|---------------------------------------------------------|----------|
| Field trips, single-day within state | No. 4585 |
| Field trips, domestic (multi-day) and foreign | No. 4587 |
| City council tours | No. 4588 |

B. LEGAL AND POLICY BASIS

1. **Reference:** Board policy: D-6000, F-5750, G-5100; Education Code Sections 35330, **39800, et seq., 39830 et seq., 39860.**

C. GENERAL

1. **Originating** Office. Suggestions or questions concerning this procedure should be directed to the Transportation Services Department.
2. **Definitions**
 - a. **Field trip transportation:** Transportation for students to an educational experience which begins and/or ends during the regular school day.
 - b. **Activity trip:** Transportation to and from a school-sponsored activity or event (other than a field trip) which is not necessarily financed by the district (e.g., athletics, drama, music, academic competition).
 - c. **School bus:** Any motor vehicle designed, used, or maintained for the transportation of any school pupil at or below the **12th-grade** level to or from a public or private school or to or from public or private school activities, under the provisions of California Education Code Section 39830.

- d. **School pupil activity bus (SPAB):** Any motor vehicle, other than a school bus, operated by a common carrier, or by and under the exclusive jurisdiction of a publicly-owned or -operated transit system, or by a passenger charter-party carrier, used under a contractual agreement between a school and a carrier to transport school pupils at or below the **12th-grade** level to or from a public or private school activity under the provisions of California Education Code Section 39830.1.
 - e. **Contract carrier:** A transportation vendor with whom the district has a contract delineating specified rates, charges, and conditions.
 - f. **Prime-time trips:** Trips scheduled when the bus fleet is needed to transport students to and from home and school. Prime-time trips occur in whole or in part between the hours of **6:00 a.m.** and **9:00 a.m.** and/or **1:30 p.m.** and **3:30 p.m.** on weekdays, excluding holidays.
 - g. **Non-prime-time trips:** Trips scheduled during the work day when drivers are not assigned other duties and buses are readily available for field trip transportation. Non-prime-time trips occur in whole between the hours of **9:00 a.m.** and **1:30 p.m.** and/or **3:30 p.m.** and **6:30 p.m.** on weekdays, excluding holidays.
 - h. **Off-time trips:** Trips scheduled in whole or in part between the hours of **6:30 p.m.** and **6:00 a.m.** on a weekday and/or during any hours on Saturdays, Sundays, and holidays, excluding trips which begin or end during prime time.
 - i. **Invoice:** A form used by a contract carrier to bill the district for transportation costs.
- 3. Modes of Transportation.** The following modes of transportation are available for school-sanctioned field and activity trips. All exceptions require prior approval of the Transportation Services Department director.
- a. **School bus.** Either a district school bus or a contract carrier school bus must be ***used if a trip is to be paid for with district funds.*** Contract carrier bus contracts cover up to 529 round trip miles.
 - b. **SPAB.** Highway coaches with seating capacities of up to 49 persons are available from contract carriers. Contracts cover up to 549 round trip miles.
 - c. **Privately-owned vehicles.** Use of private vehicles requires the approval of the principal and is subject to the following conditions:
 - (1) Under no circumstances may the maximum number of passengers transported exceed ten persons including the driver or the designed passenger capacity of the vehicle, whichever is less. Each person transported must be individually seat-belted into a designed seating space.

- (2) ***Motorhomes and truck cargo areas may not be used to transport passengers.***
- (3) Drivers operating vehicles with district students or employees aboard must possess a valid California driver's license of the appropriate class and any other applicable certificates which may be required for the vehicle driven. Drivers may not operate vehicles in violation of any driver's license restriction.
- (4) Drivers of private vehicles must demonstrate evidence of liability coverage prior to transporting passengers on an activity or trip.
- (5) The principal, sponsor, or person supervising the activity or trip must provide drivers with written instructions regarding the driver's liability, insurance requirements, vehicle requirements, safety checks, and passenger load limitations (see sample following this procedure).

4. Insurance

- a. **Private automobile insurance.** Drivers of private autos must maintain liability insurance. District insurance coverage relating to private vehicles is applicable only after the vehicle owner's insurance company has paid. If the driver of a vehicle transporting students is found negligent in the event of an accident with injury, the district's insurance covers medical expenses for occupants of the driver's auto. However, district insurance does *not* cover physical damage to the driver's auto. ***The driver is advised to carry automobile insurance coverage available to him/her for this purpose. Drivers am strongly urged to carry \$100,000/\$300,000 liability coverage.*** In the event of a judgment against a driver resulting from use of a private auto while on district business, district insurance coverage takes effect only after the driver's insurance company, as prime carrier, has paid. Drivers frequently using private autos on district business (including transportation of students) should advise their insurance company or agent. This may be considered business use of a vehicle by some companies and may result in increased premiums. However, if a driver has not advised his/her insurance carrier of this use, he/she may not be covered in the event of an accident.
- b. **District liability insurance.** The district carries comprehensive general liability insurance covering employees while acting within the scope of their employment, including transportation of students. The limit of the district's liability when a private auto is used is described in the preceding paragraph. (See Procedure No. 7180 for details on general employee liability.)
- c. **Litigation.** In the event of possible litigation, the Office of the General Counsel shall be notified immediately.

5. Parameters and Restrictions

- a. **Selecting a carrier.** The district's approval process for contract carriers ensures that they operate with certified equipment, properly licensed drivers, adequate insurance, and a stable pricing structure. Schools are prohibited from using contract carriers not listed in the annual field trip information circular published each August by the Transportation Services Department. Principals and department heads shall inform staff members of this requirement and ensure cancellation of any trips scheduled with other carriers.
- b. Ensuring **lowest** rates. The district awards contracts to all responsible field trip bidders, regardless of their pricing structures. The Transportation Services Department's annual information circular highlights the lowest costs bid for each category of service. Schools must use the carrier offering the lowest rate for each particular trip. Other carriers are used only when the low-rate supplier is unable to accept a trip due to lack of a driver or equipment availability. **Timeliness** of ordering can have a significant affect on the cost of a trip. Plan departure and return times carefully. Field trips beginning in one time rate category and ending in another time rate category will be charged at the higher of the two rates.
- c. **Timelines for scheduling.** Transportation Services Department staff contain costs by effectively coordinating the scheduling of a large number of both field trips and home-to-school bus trips. This complex process requires trips to be booked at least three weeks in advance. When the department accommodates requests with shorter timelines, additional equipment and drivers are required and the cost effectiveness of trip coordination is lost. Non-prime-time trips requested with less than 21 days notice **will** cost **nearly twice as much as** trips where more than three **weeks** notice is given. Prime-time and off-time trips ordered directly from contract carriers may be booked on shorter timelines if the carrier can accept the work. District and contract carriers shall not be obligated to furnish service with less than **seven** days notice.
- d. **Privately-funded trips.** Organizations, such as Junior League, wishing to finance field trips are encouraged to make a contribution diitly to their selected school and to request the school to arrange transportation. Otherwise, they must negotiate individually with carriers, and the less expensive rates **afforded** the district through its field trip contract may not necessarily apply to trips financed by **PTA**, services clubs, or individual parents. Field trips paid with district/special project or principal's discretionary account budget code funds (e.g., trips for ASB, drill teams, clubs, or other extracurricular programs and activities) qualify for rates established by district contracts with carriers.

When sites wish to charge trips to the **Transportation** Services Department's integration budget, the trip **must** be ordered through the department. These trips must be booked during non-prime- or off-time hours. If less than three weeks notice

is provided, the difference in rates due to late notification will be charged to the site account.

- e. **Delaying the bus.** Buses ordered for field trips usually cannot remain with a group after arrival at a destination. Buses are scheduled for other trips and must leave to transport students. If the school wants the bus to remain with the group, this must be specified on the T-Form when ordering the trip. Rates for retaining a bus are specified in quotation group #6 of the **information** circular rate table. Buses must depart **within fifteen (15) minutes** of the times **specified** on the T-Form. A delay exceeding 15 minutes could result in substantial contractual liquidated damages assessed against the school or departure of the bus without the group.
- f. **Authority of the driver. California Code of Regulations, Title 5,** Section 14103 states that pupils transported in a school bus or a school pupil activity bus shall be under the authority of, and directly responsible to, the driver of the bus, and the driver shall be held responsible for the orderly conduct of the pupils while they are on the bus. While drivers work cooperatively with teachers and chaperons in creating a safe transportation environment, decisions regarding all aspects of operating **safety** are conferred-by code-with the driver.
- g. **Safe seating requirements.** All passengers must be seated when the bus is in motion (13 CCR 1217). Bus capacities vary proportionately with the grade level of students. Recommended passenger loads are **summarized** in the Transportation Services Department's annual information circular. California Education Code Section 39834 states that any officer, agent, or employee of a school district, or any other person, knowingly operating, or permitting or directing the operation of, a school bus when it is loaded with school children in excess of the limits of its seating capacity, is guilty of a misdemeanor.
- h. **Emergency procedure instruction.-** California Education Code Section 3983 1.5 requires that, prior to departure on a school activity trip, all pupils riding on a schoolbus or school pupil activity bus shall receive safety instruction which includes, but is not limited to, location of emergency exits and location and use of emergency equipment. Instruction may also include responsibilities of passengers seated next to an emergency exit.
- i. Ordering the **trip.** The prenumbered multiple-part "Field **Trip** Order/Report Form" (T-Form) is designed to easily identify each field trip by number from inception through completion and **facilitate** payment to the carrier. Follow the instructions on the back of the form when ordering.

D. **IMPLEMENTATION**

1. **Teacher/Initiator or Other Certificated Trip Sponsor**

- a. Complies with all instructions and requirements for single- or multi-day field trips listed in appropriate procedures (see Procedure Nos. 4585 and 4587).
- b. Determines mode of transportation (see C. 3.).
 - (1) For privately owned auto transportation, verifies liability insurance coverage and issues "Instructions to Drivers of Private Vehicles" checklist (see attachment to this procedure).
 - (2) For bus transportation, completes T-Form, following instructions on reverse side of form.
- c. Upon return, completes section C of T-Form, noting if service was satisfactory. (See reverse side of T-form, section C. 1.)

2. **Principal (or Designee)**

- a. Ensures compliance with appropriate procedures (see Procedure Nos. 4585 and **4587**).
- b. Ensures estimated cost of trip and budget charge number have been recorded on original copy of T-Form. **For privately-funded trips:**
 - (1) Uses ASB trust fund number or a fund code in budget code portion of section B of T-Form.
 - (2) Obtains check for estimated cost of trip (payable to San Diego Unified School District).
- c. Approves or denies request; signs indicating approval **prior to trip**. For **privately-funded trips:**
 - (1) Upon completion of trip, **attaches check to** original (white) and second (blue) copies of T-Form and forwards to Budget Management and Cost Controls Department.
 - (2) Bills PTA or other private source for additional costs in excess of estimated cost of trip.
- d. Forwards pink, goldenrod, and green copies of T-Form to Transportation Services Department.

- e. Upon return and receipt of service teacher's evaluation information on **T-form**, files yellow copy and forwards remaining white and blue copies to Budget Management and Cost Controls Department.
- 3. School Services Area Assistant Superintendent. Approves or disapproves** request, if applicable (see Procedure Nos. 4585 and 4587); secures Board of Education approvals, if necessary; notifies principal of decision.
- 4. Transportation Services Department**
- a. Receives T-Form; verifies budget charge numbers for district-operated trips; and forwards pink and goldenrod copies to appropriate carriers.
 - b. For non-contracted service, prepares journal voucher charging site account.
 - c. Adjudicates claims of unsatisfactory service or excess costs referred by division, school, or Fiscal Control Department.
 - d. Assesses liquidated damages or charges against carrier or school when warranted; maintains service record for each carrier.
 - e. For district-operated trips, issues instructions to bus drivers.
- 5. Budget Management and Cost Controls Department.** For trips assigned to contract carriers:
- a. Receives T-Form and validates budget charge number.
 - b. Encumbers appropriate budget account and files T-Form copy.
 - c. Submits checks to district cashier for deposit.
 - d. Forwards original (white) T-Form copy to Accounts Payable Unit, Fiscal Control Department.
- 6. Accounts Payable Unit, Fiscal Control Department.**
- a. Upon receipt from Budget Management and Cost Controls Department, files **T-Form** originals by carrier and trip order number; retains until invoice is received.
 - b. Receives invoice (pink) copy of T-Form from carrier and retrieves matching original from files; resolves discrepancies and claims of unsatisfactory services or refers to **Transportation** Services Department for resolution.
 - c. Issues payment to carriers for approved charges.

7. Contract Carrier

- a. Enters **T-Form** order number on appropriate invoice to facilitate payment.
- b. At completion of trip, (driver) obtains signature and comments of teacher/initiator on copies of **T-form**.
- c. Sends invoice to Accounts Payable Unit, Fiscal Control Department, for all transportation provided; encloses pink copy of each T-Rum for which payment is requested. Describes any adjustments to field trip costs on T-Form.
- d. Provides justification for discrepancies between estimated and actual costs to Accounts **Payable** Unit, Fiscal Control Department.

E. FORMS AND AUXILIARY REFERENCES

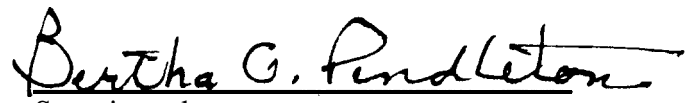
1. Field Trip Order Report Form (T-Form), Stock No. 22-E-1225
2. Field **Trip** Carriers and Bates, **information** circular issued annually in August by Transportation Services Department.
3. Instructions to Drivers of Private Vehicles (sample).

F. REPORTS AND RECORDS

1. Existing financial reports (to provide overall view of field trip effect on allocated funding).
2. Field **Trip** Order/Report Form (T-Form), retained **two** years.
3. Carrier service records, retained three years by Transportation Services Department.

G. APPROVED BY


Assistant Superintendent
Business Services


Superintendent

SECTION A: TO BE COMPLETED BY TEACHER PLEASE TYPE OR PRESS HARD

Trip date: _____ School requesting trip _____
Month Day Year

| Time bus is to arrive for pickup of passengers | Exact Pickup Location for Passengers Loading Example: Flag Pole Loading Zone Parking Lot <i>(Please provide address if known)</i> | Destination or Exact Location of Pickup Point for Return <i>(Please provide address if known)</i> <i>(Use separate line for each destination or return location)</i> | Time bus is to pickup passengers for the return |
|------------------------------------------------|-----------------------------------------------------------------------------------------------------------------------------------------|----------------------------------------------------------------------------------------------------------------------------------------------------------------------------|-------------------------------------------------|
| am* pm* | | | am* pm* |
| am* pm* | # | | am* pm* |
| am* pm* | # | | am* pm* |
| am* pm* | ff | | am* pm* |

PICK-UPS ONLY

DESTINATION ONLY

*Circle am or pm #Extra charge for multiple destination One way trip paid at 50% of bid rate

Purpose: _____ No. of pupils + No of adults = Total number of passengers

Teachers: _____ / _____ / _____ Special instructions: _____
(Name of teacher in charge) Class Grade

Name Class Grade

(Teacher's Signature)

SECTION B: TO BE COMPLETED BY PRINCIPAL AND SECRETARY OR PRINCIPAL'S DESIGNEE

Carrier: _____ Person contacted: _____ Carrier contact made by: _____

Type of expenditure: _____ Charge to: _____
(Enter Budget Code)

Trip approved by: _____ Date _____
*Site/650 Administrator's Signature

I have read and complied with the provisions of district Procedures No. 4585 and No. 4586

*Trips paid by site funds must be approved by site administrator
 *Trips paid by 650 cost center must be approved by Transportation Department

Number and size of buses ordered _____
(#) (Sin of Bus)

Estimated charges: _____

SECTION C: TO BE COMPLETED BY TEACHER

_____ Number of minutes bus was late _____ Number of minutes school was late
 _____ Trip cancelled _____ Trip cancelled

COMMENTS: _____

Date trip was taken _____ Signature confirming trip was taken _____
(Teacher or Authorized Representative) Date

*Trips paid by non-District funds must have check attached to white copy (includes ASB, PTA, etc.)

DISTRICT USE ONLY

CARRIER USE ONLY

CARRIER: RETURN PINK COPY WITH INVOICE ATTACHED TO:
 ACCOUNTS PAYABLE UNIT, 4100 NORMAL ST., SAN DIEGO, CA 92103

Base amount: _____ / _____ Charge
 Contract Reference No. _____
 Adjustments: _____ / _____ Charge
 Contract Reference No. _____
 Liquidated Damages: _____ / _____ Charge
 Contract Reference No. _____
 Total Charges _____

I N S T R U C T I O N S

(Please type or press hard; check last two copies for legibility)

PRIOR TO TRIP

SECTION A: Teacher

1. Verify details of trip with intended destination, initiate T-Form as far in advance as possible.
2. Complete Section "A" in full:
 - a. Enter pickup time(s) in first column (Circle "a.m." or "p.m." as appropriate; do NOT cross out.)
 - b. Provide exact pickup and/or dropoff points, including description if needed (i.e., south end of building by stop sign).
 - c. Indicate grade level, total number of pupils, and total number of adults.
 - d. Include any special requests (i.e. seat belts needed, oversized wheelchairs, driver to stand by, etc.)
3. Forward to Principal.

SECTION B: Principal and Secretary/Principal's Designee

1. Review district Procedures Nos. 4585 and 4586 to assure compliance.
2. Determine lowest bid carrier indicated on annual listing from Transportation Services Department.
3. Using seating/bus size figures on annual listing, determine number and size of buses needed based on grade level and number of passengers. (Example: One 87-passenger bus and one 48-passenger bus.)
4. Enter budget code charge number for all trips except those transporting Integration students home to school. Transportation Department must approve all trips paid by the 650 Integration budget.
5. Contact carrier to confirm trip date availability, obtain carrier's estimated charges, and schedule bus(es). **Preliminary arrangements should be made at least twenty-one (21) calendar days prior to the trip.**
6. Send pink, goldenrod and green copies of form to Transportation Department. (Do not send checks at this time.) Retain remaining copies until after trip. **Forms must be received by Transportation Department at least 10 calendar days prior to trip.**

TO CANCEL TRIP: Please notify carrier as early as possible if trip must be cancelled. Cancellation charges will apply if trip is not cancelled at least two (2) hours in advance of first stop.

AFTER TRIP

SECTION C:

1. Site representative completes all sections as appropriate; signs form and submits to secretary or principal's designee.
 - a. Any comments which may result in assessed liquidated damages must be noted. (Example: "Bus was 20 minutes late," "Bus was too small," "Boarded 16 min. late.")
 - b. Notify secretary/principal's designee of any changes required on the form (i.e. addition or reduction in estimated cost due to changes in destination or bus size, overtime charges, etc.)
 - c. Include positive comments also. (Example: "Driver and trip were excellent.")
2. Secretary/principal's designee files yellow copy and forwards two copies (white and blue) to Budget Office. If trip is to be paid by check, attach check to forms.

SAMPLE

INSTRUCTIONS TO DRIVERS OF PRIVATE VEHICLES TRANSPORTATION FOR FIELD TRIPS AND TO SCHOOL EVENTS

Instructions for parents and students who use their cars or other vehicles to transport other students on field trips, or to and from school events:

1. ***Make sure that you have a valid driver's license.***
2. ***Check safety of the vehicle:*** tires, brakes, lights, horn, suspension, etc. A **safety** check of the type conducted by the California Highway Patrol is recommended. Also, the School Safety Division of the San Diego Police Department can be of assistance.
3. ***Check the adequacy of your liability insurance.*** You are liable in the event of illness, accident, injury, or death resulting from such use of your vehicle. State law says that "all persons making any field trip or excursion shall have been deemed to have waived all claims against the district (its employees) or the State of California for injury, accident, illness, or death occurring during or by reason of the field trip or excursion" (Ed. Code 35330).
4. ***Carry only the number of passengers for which your vehicle was & signed. The number of occupants in a se&m, passenger vehicle, station wagon, or van, including the driver, may not exceed ten*** (Ed. Code 39830). Each passenger is required to use a safety belt (Vehicle Code 27315).
5. ***The number of occupants in a pickup or motortruck may not exceed more persons than can safely sit belted in the passenger compartment.*** Motorhomes may not be used to transport students. Students are expressly forbidden to ride in the cargo area of pickups or motor-trucks whether or not these areas are enclosed by **camper** shells or other protective covering. (Ed. Code 39830).
6. ***Travel caravan style if more than one vehicle is used for the trip.***