

Finance

**Superintendent's Goals
Strategic Plan: Year 2**

June 14, 2016

Strategic Plan: Finance Year-2 Goals

Priority 1: System Refinement

Priority 2: Maximize Resources

Priority 3: Transparency

Priority 4: Legislative Advocacy

Priority 5: External Funding

Strategic Priority 1: System and Process Creation and/or Refinement –

Year 2 Goal: Implement Change Management Strategies to increase communication and collaboration.

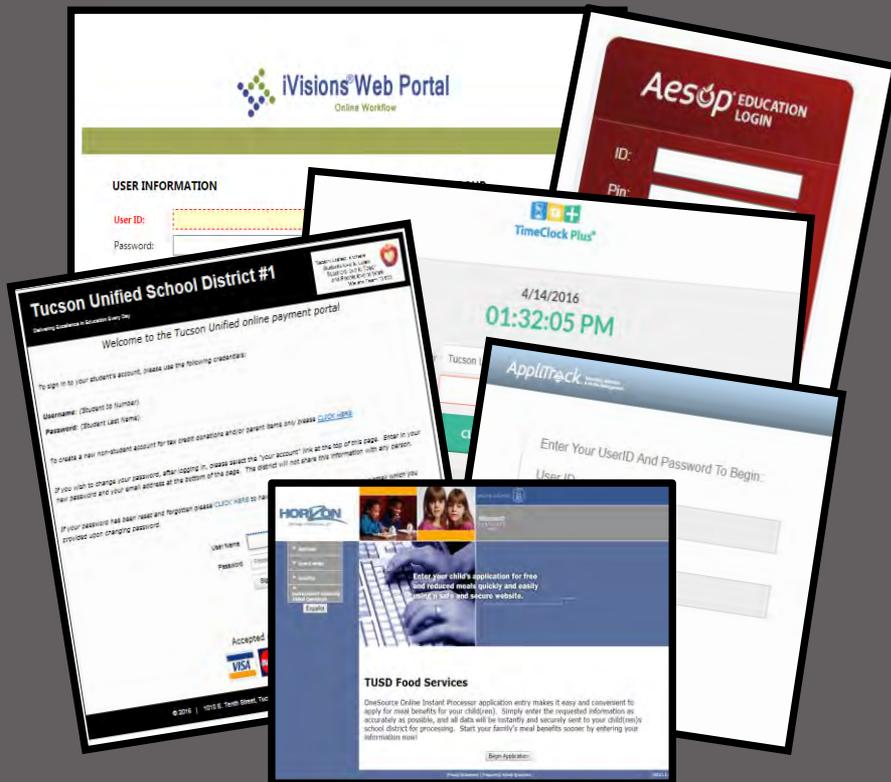
Evidence: 100% of personnel will be trained on new ERP and HR and Finance functions following CM processes by June 30, 2016

100%
Completed



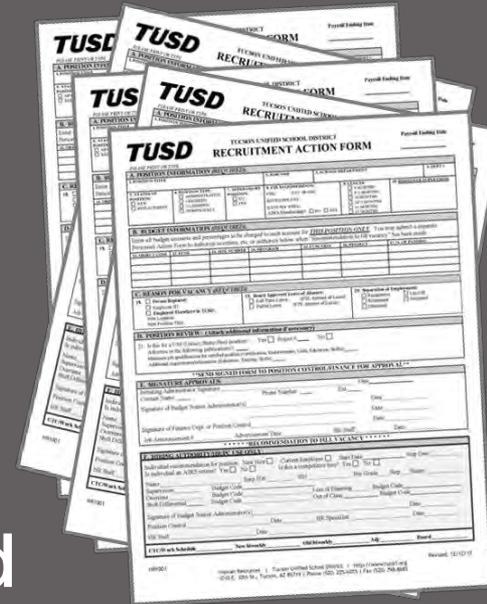
Systems Integrated with Visions

- Time Clocks Plus
- Applitrack
- Subfinder/Aesop
- InTouch
- Horizon



Systems Replaced

- Lawson
- PeopleSoft
- Kronos
- Blue Bear
- WinSnap



Eliminated

- 13+ Finance Forms
- 16+ Human Resource Forms
- Many time consuming manual processes

ERP System Training

Tyler Training and Support*		
Core Visions Product Training	September 2014–June 2015	80 Sessions
iVisions DAC Training	March–August 2015	32 Sessions
Additional Consulting and Process Reviews	July 2015–April 2016	31 Session
Monthly Status Calls	November 2015–March 2016	6 Calls
Time Clocks Plus Training and Support		
Initial Training	May–June 2015	
Train-the -Trainer Classes	January 2016	28 sessions
AppliTrack Training and Support		
HR Staff Training	August 2014–February 2015	9 sessions
Open Training	September 2014–January 2016	28 sessions
ILA Training	September–December 2014	4 sessions
InTouch Training and Support		
InTouch Lab Training	April–May 2016	9 sessions
Office Manager Training	April–May 2016	6 sessions

* iVisions Users are not give access until training is completed. There are currently 680 users and 138 DAC's in the system.

Priority 1

✓ 100% completed

Strategic Priority 2: Maximize Existing Revenue and Resources –

Year 2 Goal: Utilize fiscal resources that support TUSD Strategic Plan

Evidence: Ensure 100% implementation of asset management system by June 30, 2016

100%
Completed



Visions Asset Management

- Software installed (Module in Visions)
- Last physical inventory taken Fall 2014
- Asset management training is provided to sites yearly as part of Office STARS
- Tyler Technologies facilitated 9 Visions trainings to Asset Management staff
- Process development and Data Upload in progress
- Asset Management Enhancement - Barcoding project (Hayes System)
 - ✓ Sites will be able to manage inventory at their sites
 - ✓ UPS style Sign In/Sign Out tracking from dock to site
 - ✓ Allows for use of scanner when taking inventory
 - ✓ Allows for more detailed tracking – room and employee level

Priority 2

✓ 100% completed

Strategic Priority 3: School Finance Education and Transparency –

Year 2 Goal: Enable end-users to produce accurate and timely reports with the new ERP system.

Evidence: Roll out 100% of training to ensure end-users can produce reports in a timely manner by June 30, 2016

100%
Completed



Systems Reporting

Visions

Budget Report

Purchase Order Balance Report

Position Control

Employee Information

Time Clocks Plus

Leave Request Report

Overtime Report

Missed Punch Report

In Touch

On-line Sales Reporting

- Set up for sponsors and coaches
- For items such as yearbook sales, participation fee & tax credit payments for a particular activity

Subfinder/Aesop

Teacher Absence Report

Available Substitutes Report

AppliTrack

Applicant Status Report

Horizon

POS Accountability & Cashier Report

Federal & State Claim Report

Free & Reduced Report

Meal Planner / Nutrition Analysis Report

Inventory /Warehouse/Distribution Routes Report

Special Diet Information

Systems Report Training

- Onsite iVisions DAC Training Sessions- 501 users, 93 Core Product users
- Monthly Office Manager Meetings in March-May-165 attendees each month
- One-on-One Training as needed to Principals, Office Managers and New Users
- Principal meetings (ILA)- 89 Principals
- BLT/ILT meetings- 61 attendees
- Open Labs- 175 attendees
- Memos- sent to 12 SLT members, 38 Directors, 89 Principals, 50 Assistant Principals, 91 Office Managers, 39 Dept. Assistants, 9 High School Finance Managers
- Intranet Instructions
- Office STARS Training (407 attendees)
- District Operating Guide (D.O.G.)

Training Checklist:

- ✓ How to print and read Budget Reports.
- ✓ How to filter budget strings.
- ✓ How to view positions.
- ✓ How to process Budget Adjustments.
- ✓ How to input ePARS & Requisitions

Priority 3

✓ 100% completed

Strategic Priority 4: Legislative Advocacy–

Year 2 Goal: TUSD will develop an outreach committee to address funding in public education

Evidence: Create no less than 4 opportunities to gather TUSD stakeholders to obtain information on legislative initiatives by June 30, 2016.

100%
Completed



- 10/29/15- Governor's Classrooms First Council Meeting
Duffy Community Center
- 11/16/15- Your Voice Legislative Advocacy Info Session
Tucson High School

<https://www.youtube.com/watch?v=mnM8JyxKdiA>

- 11/19/15- Diane Douglas-"We Heard You Tour"
Catalina High School

<https://www.youtube.com/watch?v=01vzyh-iw4A>

- 11/20/15- ABEC (AZ Business & Education Coalition) Meeting at
Santa Rita High School
- 4/19/16 – Governing Board Meeting Legislative Update



Priority 4

✓ 100% completed

Strategic Priority 5: External Funding to Support Strategic Priorities –

Year 2 Goal: TUSD will provide fundraising strategies that will support district initiatives and student achievement.

Evidence: Train 80% of site council facilitators on using & increasing tax credit revenue by 5% across the district.

100%
Completed &
Ongoing



Training and Initiatives

- *Training on “How to increase and promote your Tax Credit Program” held on May 17, 2016 for Site Council Facilitators, PTO / PTA / Parent Booster Representatives, and Site Principals to help schools:
 - ✓ Define goals of extracurricular activities/programs offered for their students
 - ✓ Understand tax credit requirements and how these funds can achieve their goals
 - ✓ Identify other funding sources and learn how they can supplement tax credit funds
- Banners given to schools to advertise Tax Credits programs
- Facebook campaign - Tax Credit Tuesday
- Annual training will be provided at the Mandatory Site Council Facilitator Training

*Training attended by 89 site representatives and others participated via livestream video. Video & Quiz are available for ongoing training via the TUSD Professional Learning Portal for new Facilitators and is required for those that did not attend May training.

Tax Credit Revenues

2015 Fiscal Year	\$2,752,000
2016 Fiscal Year	\$3,039,095 (as of 5/31/2016)
Increase 10.4%	\$287,095

Additional Year 2 Goal-Decrease Student Enrollment Loss

Evidence: Either maintain or lose no more students than the average student loss from SY12-13 to SY13-14 and from SY13-14 to SY14-15

Year	100 th Day ADM	Difference from Prior Year	Percent Change
FY13-14	46,794	-1,531	-3.2%
FY14-15	45,944	-850	-1.8%
FY15-16	45,369	-575	-1.3%

100%
Completed



Priority 5

✓ 100% completed

Strategic Plan: Finance Year-2 Goals

- ☑ 100% Completed: **Priority 1: System Refinement**
- ☑ 100% Completed: **Priority 2: Maximize Resources**
- ☑ 100% Completed: **Priority 3: Transparency**
- ☑ 100% Completed: **Priority 4: Legislative Advocacy**
- ☑ 100% Completed: **Priority 5: External Funding**



Tucson Unified
S.T.E.A.M. Schools
Award-Winning
Choice
Heritage
Career Readiness
Responsibility
Technology
Caring
Communication
Graduate
S.T.E.M.
Elementary
K-8
High
Magnet
Middle
Diversity
S.T.E.A.M.
Early Childhood
Kids
Inspire
Achieve
Family
Character
Hope
Educate

