

TUCSON UNIFIED SCHOOL DISTRICT

STRATEGIC PLAN END OF YEAR REPORT 2015-2016

FINANCE

Strategic Priority 1: System and Process Creation and/or Refinement – TUSD will streamline systems and processes so that dollars/resources are maximized.

Year 2 Goal: Implement Change Management Strategies with integrated processes to increase communications and collaboration.

Progress/Completion: 100% Complete

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

Systems Integrated with ERP (Visions):

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

ERP & Integrated Systems replaced 5 outdated systems, eliminated 13+ Finance Forms / 16+ Human Resources Forms, and many time consuming manual processes.

ERP (Visions) Training: (Appendix 1.1)

Visions Core Product training – 80 sessions

iVisions DAC training – 32 sessions

Additional Consulting and Process Review – 31 sessions

Monthly Status calls – 6 calls

Training also provided for Time Clocks Plus, Applitrack, Subfinder, InTouch, and Horizon **(Appendix 1.2, 1.3, 1.4, 1.5)**

District Training and Support

Open Labs

Monthly training meetings for Office Managers & Administrative Assistants

One-on One training as needed to Principals, Office Managers and New Users

Office STARS Training

District Operating Guide (D.O.G.) **(Appendix 1.6)**
iVisions Users are not given access until training is completed.

Appendix 1.1

Strategic Priority 2: Maximize Existing Revenue and Resources – TUSD will develop a plan to leverage district resources to support the district’s Five-Year Strategic Plan.

Year 2 Goal: Utilize fiscal resources that support TUSD Strategic Plan (contingent on available resources).

Progress/Completion: 100% Complete

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

Visions Asset Management Software installed (Appendix 2.1)

- Last physical inventory taken Fall 2014
- Asset management training is provided to sites yearly as part of Office STARS **(Appendix 2.2)**
- Tyler Technologies facilitated 9 Visions trainings to Asset Management staff **(Appendix 2.3)**
- 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

Strategic Priority 3: School Finance Education and Transparency – TUSD will effectively Communicate to and educate all stakeholders on the finances of the district.

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

Progress/Completion: 100% Complete

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

Systems Report Training

- Onsite DAC Training Sessions (501 iVisions Site users, 93 Core Visions Product Users trained (Central offices HR, Finance, Payroll, Food Service, Operations)
- Monthly Office Manager Meetings (March-May) (165 attendees each month) **(Appendix 3.1)**
- One-on-One Training as needed to Principals, Office Managers and New Users **(Appendix 3.2)**
- Principal meetings (ILA) (89 Principals)
- BLT/ILT meetings (61 Trained)
- Open Labs (175 Trained) **(Appendix 3.3)**
- Memos (sent to 12 SLT members, 38 Directors, 88 Principals, 50 Assistant Principals, 91 Office Managers, 39 Department Assistants, 9 High School Finance Managers)
- Intranet Instructions
- Office STARS Training (407 attendees)
- District Operating Guide (D.O.G.)

Systems Reports and Grid exports available to end-users

Visions - Budget Report, Purchase Order Balance Report, Position Control, Employee Information

Time Clocks Plus - Leave Request Report, Overtime Report, Missed Punch Report

Applitrack - Applicant Status Report

Subfinder/Aesop - Teacher Absence Report, Available Substitutes 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)

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

Strategic Priority 4: Legislative Advocacy – TUSD will collaborate with legislature to develop strong relationships that promote advocacy for education.

Year 2 Goal: TUSD will develop an outreach committee to address funding in public education that will speak to various organizations regarding education funding and expenditures.

Progress/Completion: 100% Complete

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

District Sponsored events

- 10/29/15- Governor’s Classrooms First Council Meeting at Duffy Community Center **(Appendix 4.1)**
- 11/16/15- Your Voice Legislative Advocacy - Info Session at Tucson High School **(Appendix 4.2)**
- 11/19/15- Diane Douglas- “We Heard You Tour” at Catalina High School **(Appendix 4.3)**
- 11/20/15- ABEC (AZ Business & Education Coalition) Meeting at Santa Rita High School **(Appendix 4.4)**
- 04/19/16 – Governing Board Meeting Legislative Update – Review of Bills impacting K-12 Education

Strategic Priority 5: External Funding to Support Strategic Priorities – TUSD will actively seek and identify external funding to leverage resources which enhance student achievement.

Year 2 Goal: TUSD will create a comprehensive four-year plan for the addition of site-based fund development programs that will support district initiatives and student achievement.

Progress/Completion: 100% Complete and Ongoing

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

Training and Support: (Appendix 5.1)

- *May 17, 2016 “How to increase and promote your Tax Credit Program” for Site Council Facilitators, PTO/PTA Representatives, Parent Booster Representative, and Site Principals to help:
 - ✓ Schools define goals of extracurricular activities/programs offered for their students
 - ✓ Schools understand tax credit requirements and how these funds can achieve their goals
 - ✓ Schools identify other types of funding sources and learn how they can supplement tax credit funds
- Banners given to schools to advertise Tax Credits contributions
- 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. **(Appendix 5.2, 5.3)**

Increasing Tax Credit Revenues:

FY14-15 Tax Credit Revenues \$2,752,000

FY15-16 Tax Credit Revenues \$3,039,095 (as of 5/31/2016)

Total Increase = \$287,095 – 10.4%

Additional Year 2 Goal: Decrease Student Enrollment Loss

Progress/Completion: 100% Complete

Evidence: Based on the average of the student loss of the 2012-13 SY to the start of the 2013-14 SY and of the average student loss of the 2013-14 SY to the start of the 2014-15 SY, the district will either maintain or lose no more students than the average

SY13-14 Enrollment decreased by 3.2% compared to SY12-13 (-1,531 ADM)

SY14-15 Enrollment decreased by 1.8% compared to SY13-14 (-850 ADM)

SY15-16 Enrollment decreased by 1.2% compared to SY14-15 (-575 ADM)

Priority #1: System & Process Creation/Refinement	100%
Priority #2: Maximize Existing Revenue & Resources	100%
Priority #3: School Finance Education & Transparency	100%
Priority #4: Legislative Advocacy	100%
Priority #5: External Funding to Support Strategic Priorities	100%
Total	100%

APPENDICES

Appendix 1.1 iVisions Training Schedule

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

Appendix 1.2 Time Clocks Plus Training Schedule

Training Week 1 (TS Computer Lab 1010 Basement)					
	Monday January 4, 2016	Tuesday January 5, 2016	Wednesday January 6, 2016	Thursday January 7, 2016	Friday January 8, 2016
8:00-10:00	Session 1 (20 Seats)	Session 4 (20 Seats)	Session 7 (20 Seats)	Session 10 (20 Seats)	Session 14 (20 Seats)
10:00-12:00	Session 2 (20 Seats)	Session 5 (20 Seats)	Session 8 (20 Seats)	Session 11 (20 Seats)	Session 14 (20 Seats)
1:00-3:00	Session 3 (20 Seats)	Session 6 (20 Seats)	Session 9 (20 Seats)	Session 12 (20 Seats)	Session 15 (20 Seats)
Training Week 2 (Duffy Computer Lab)					
	Monday January 11, 2016	Tuesday January 12, 2016	Wednesday January 13, 2016	Thursday January 14, 2016	Friday January 15, 2016
8:00-10:00	Session 16 (15 Seats)	Session 19 (15 Seats)	Session 22 (15 Seats)	Session 25 (15 Seats)	Session 27 (15 Seats)
10:00-12:00	Session 17 (15 Seats)	Session 20 (15 Seats)	Session 23 (15 Seats)	Session 26 (15 Seats)	Session 28 (15 Seats)
1:00-3:00	Session 18 (15 Seats)	Session 21 (15 Seats)	Session 24 (15 Seats)		

Appendix 1.3 AppliTrack Training Schedule

HR Staff Training	
August 2014	6 sessions
September 2014	2 sessions
February 2015	1 session
Open Training	
September 2014	9 sessions
January 2015	2 sessions
July 2015	2 sessions
August 2015	4 sessions
September 2015	8 sessions
January 2016	3 sessions
ILA Training	
September 2014	2 sessions
December 2014	2 sessions

Appendix 1.4 Subfinder Training Schedule

Subfinder/Aesop Training		
Initial Subfinder Training	March 2015	5 Sessions
Sub Office Staff Aesop Training	April 2016	4 Sessions
Site Office Manager Training	April 2016	3 Sessions

Appendix 1.5 InTouch Training Schedule

Tuesday, April 05, 2016	
▲	Time 12:00 PM – 3:00 PM Subject InTouch lab Location Palo Verde High Magnet School, 1302 S Ave Vega, Tucson, AZ 85710, United States sign-up in True North Logic
Wednesday, April 06, 2016	
▲	Time All Day Subject InTouch User Conference Location Flowing Wells Unified School District, 1556 W Prince Rd, Tucson, AZ 85705, United States
▲	Time 2:30 PM – 4:00 PM Subject Support Staff Location Duffy Family & Community Center, 655 N Magnolia Ave, Tucson, AZ 85711, United States
Thursday, April 07, 2016	
▲	Time 12:00 PM – 3:00 PM Subject InTouch lab Location Pueblo Communication Arts Magnet High School, 3500 S 12th Ave, Tucson, AZ 85713, United States sign-up in True North Logic
Friday, April 08, 2016	
▲	Time 12:00 PM – 3:00 PM Subject InTouch lab Location Tucson High Magnet School, 400 N 2nd Ave, Tucson, AZ 85705, United States sign-up in True North Logic
Wednesday, April 13, 2016	
▲	Time 2:30 PM – 4:00 PM Subject Support Staff Location Duffy Family & Community Center, 655 N Magnolia Ave, Tucson, AZ 85711, United States
Thursday, April 14, 2016	
▲	Time 12:00 PM – 3:00 PM Subject InTouch lab Location Pueblo Communication Arts Magnet High School, 3500 S 12th Ave, Tucson, AZ 85713, United States sign-up in True North Logic

Tuesday, April 19, 2016	
▲	Time 12:00 PM – 3:00 PM Subject InTouch lab Location Tucson High Magnet School, 400 N 2nd Ave, Tucson, AZ 85705, United States sign-up in True North Logic
Wednesday, April 20, 2016	
▲	Time 2:30 PM – 4:00 PM Subject Support Staff Location Duffy Family & Community Center, 655 N Magnolia Ave, Tucson, AZ 85711, United States
Thursday, April 28, 2016	
▲	Time 12:00 PM – 3:00 PM Subject InTouch lab Location Pueblo Communication Arts Magnet High School, 3500 S 12th Ave, Tucson, AZ 85713, United States sign-up in True North Logic
Tuesday, May 03, 2016	
▲	Time 12:00 PM – 3:00 PM Subject InTouch lab Location Tucson High Magnet School, 400 N 2nd Ave, Tucson, AZ 85705, United States sign-up in True North Logic
Wednesday, May 04, 2016	
▲	Time 2:30 PM – 4:00 PM Subject Support Staff Location Duffy Family & Community Center, 655 N Magnolia Ave, Tucson, AZ 85711, United States
Wednesday, May 11, 2016	
▲	Time 2:30 PM – 4:00 PM Subject Support Staff Location Duffy Family & Community Center, 655 N Magnolia Ave, Tucson, AZ 85711, United States
Thursday, May 12, 2016	
▲	Time 12:00 PM – 3:00 PM Subject InTouch lab Location Palo Verde High Magnet School, 1302 S Ave Vega, Tucson, AZ 85710, United States sign-up in True North Logic
Wednesday, May 18, 2016	
▲	Time 2:30 PM – 4:00 PM Subject Support Staff Location Duffy Family & Community Center, 655 N Magnolia Ave, Tucson, AZ 85711, United States

Appendix 1.6 District Operating Guide (D.O.G.) Table of Contents

The screenshot shows a web browser window with a purple header bar. The browser's address bar shows the page number '1 / 125' and a zoom level of '100%'. The browser's menu bar includes 'File', 'Edit', 'View', 'Window', and 'Help'. The toolbar contains various icons for creating, saving, and navigating. The page content is divided into two main sections. On the left, a 'Bookmarks' sidebar is open, displaying a hierarchical list of red text links: 'TABLE OF CONTENTS', 'I. Introduction', 'II. Department Roles', 'III. Systems Applications', 'IV. Information & Processes (How To's)', 'V. Flow Charts', 'VI. Templates', 'VII. Check Lists', 'VIII. Tips & Tricks', 'IX. Organizational Charts', 'X. Contact Lists', 'XI. School Directories', and 'XII. Glossary / Acronyms'. On the right, the main content area features the 'TUCSON UNIFIED SCHOOL DISTRICT' logo at the top, followed by a horizontal line and a blue text link for 'TABLE OF CONTENTS'. Below this link is a list of blue text links corresponding to the sections in the sidebar: 'I. Introduction', 'II. Department Roles', 'III. Systems Applications', 'IV. Information & Processes (How To's)', 'V. Flow Charts', 'VI. Templates', 'VII. Check Lists', 'VIII. Tips & Tricks', 'IX. Organizational Charts', 'X. Contact Lists', 'XI. School Directory', and 'XII. Glossary / Acronyms'.

File Edit View Window Help

Create 1 / 125 100% Tools Sign Comment

Please fill out the following form. Highlight Existing Fields

Bookmarks

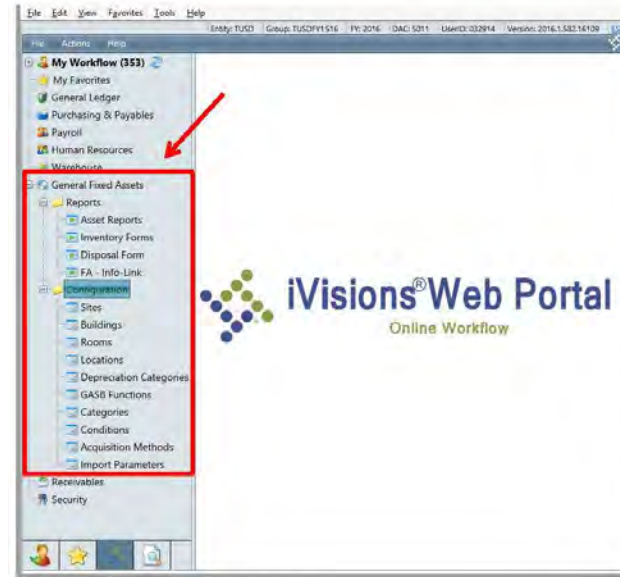
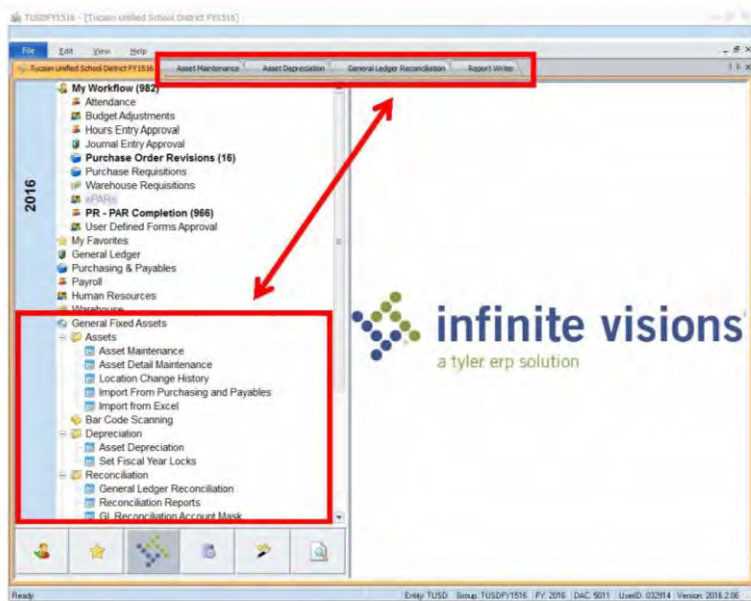
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Appendix 2.1 Visions Asset Management System



Appendix 2.2 Asset Management Office Stars PowerPoint

ASSET MANAGEMENT
Christina Cruz

- New Coding Rules for Assets**
 - The State of Arizona based a revision of the state of account effective 10/1/2015.
 - One of the new revised was coding of equipment. Due to this revision, TUDD will now code certain of the following items:
 - Items with a cost of less than \$500.00. Pending the choice height charges will be made for 100 items.
 - CCA vehicles.
 - CCA equipment. Revised included and excluded.
 - Items with a cost of \$500.00 or more (including the vehicle height charges) will be made for 100 items.
 - CCA vehicles.
 - CCA equipment. Revised included and excluded.
- Maintaining Site Inventories**
 - The State of Arizona based a revision of the state of account effective 10/1/2015.
 - All vehicles or equipment valued \$1,000 or more (including height charges) will be made for 100 items or more.
 - CCA equipment. Revised included and excluded.
 - CCA equipment. Revised included and excluded.
- Central Receiving**
 - The Central Receiving system is used to track the receipt and disposition of all equipment and materials received by the district.
 - Items received by the district must be tracked in the system.
 - Items received by the district must be tracked in the system.
- Transfers/Removal of Property Furniture & Equipment**
 - Equipment and furniture items that are no longer needed by the district must be tracked in the system.
 - Items to be tracked in the system must be tracked in the system.
 - Items to be tracked in the system must be tracked in the system.
- Donations to the District**
 - Donations to the district must be tracked in the system.
 - Items to be tracked in the system must be tracked in the system.
- District Auction**
 - Items are offered for sale using the services and web site of Public Surplus, LLC.
 - Blender contract with TUDD employees, other than the employees of Asset Management on the subject of a bid is prohibited.
 - An employee of the school district or a governing board member shall not directly or indirectly purchase or agree with another person to purchase surplus property if said employee or board member is, or has been, directly or indirectly involved in the purchase, disposal, maintenance, or preparation for sale of the surplus material.
- Open House at the Surplus Warehouse**
 - The Surplus Warehouse is located at 1940 East Winst.
 - Open House is held on the 3rd Wednesday of each month from 7:00 am to 2:00 pm (Closed June & July).
 - Surplus items include: desks, chairs, cabinets, play equipment, workstations.
 - Surplus items are free of charge, and are for District use only.
 - You may email assetmanagement@tuudd.net to inquire about availability of certain items at the warehouse.
- New Bar Coding System**
 - TUDD will begin the process of implementing a new bar coding system within the next few months.
 - A few of the features available in the system:
 - Managing of assets assigned to district employees.
 - Tracking assets that are in transit for delivery or repair.
 - The ability to assign a room number to assets and to change room numbers when the asset is moved within the site.
 - Use of a scanner when taking inventory.
- Training**
 - For training or assistance regarding the processing of your assets please contact Asset Management Staff.
 - We are available to train at our offices or at your site.

Asset Management Staff:
Office Number 225-4899
Frank Guerrero 225-4984
Maira Espinoza 225-4981
Roanna Ogier 225-4983

Appendix 3.2 Magnet Budget Meetings Summary

Recently, the Finance Department and the Magnet Department were asked to check in with each campus to review 2015-16 Magnet budgets. Attendees were encouraged to ask questions and received clarification on any pending questions / issues involving their magnet budget.

Highlights:

- 1) By February 11th (next Thursday), all Magnet budget adjustments (modifications) for your school must be in the system to Richard Foster for approval. With budget adjustments (modifications), you are allowed to move any unspent monies to where you expect to spend them (as long as the expenditure benefits your Magnet goals) for the remaining 15-16 year.
- 2) After you have submitted your budget modifications, email the Magnet Department (Victoria Callison and Adelle McNiece) with any changes that should be incorporated into your 2015-16 MSP. Please cc your Director. These amendments should follow the attached formatting so that we can properly revise your plan to reflect updates since the plans were last filed with the courts. Please submit these changes immediately after you have submitted your budget modifications. A sample is attached (Magnet School Plan AMMENDMENTS).

The agenda for these meetings included the following topics:

- ✓ How to find and read Deseg Budget Reports.
Go to General Ledger → Reports → General Ledger Report Writer. Remember that in order to view these, you must highlight the Deseg line, then go to Actions → Print Selected Report. Select the date range and "Budget Adjustments," then click OK. This report reports totals by USP Activity.
- ✓ How to filter budget strings.
Go to General Ledger → Transaction Inquiry → Account Detail. To view your Magnet budget, change the budget string to read: ????.????.?????????.80202.???? Filtering this string will also work in other ways. For example, if you want to view your magnet supplies, you would change the budget string to read: ????.????.????6611.????80202.????
- ✓ How to view positions.
Go to Human Resources → Employees → Employee Positions and Pay. Click "Show Funding" and then "Apply." All positions including supplemental assignments will be listed. You may choose to collapse any unfilled positions. A budget adjustment may be completed to move this money into any other line. See below for further tips on budget adjustments.
- ✓ How to use your supplemental funding allocation (if applicable)

2/8/2016

Many magnet campuses were provided with a supplemental funding allocation in mid-November. The allocations may be moved to a different budget line as long as doing so is in alignment with your magnet. If so, please submit budget adjustments (modifications) in iVisions, and fill in the required information in the attached table.

- ✓ How to facilitate the process for budget mods/ePARS
 - Check to make sure the correct budget line exists in your DAC for your debit. If a line is needed, please contact your budget analyst immediately so that they can create the line BEFORE you start your budget adjustment
 - All budget adjustment requests that take money from M & O and move it into capital will require that the money be first moved into the contingency fund. Then, money can be moved from contingency capital into the correct line. Please check to see if you have the contingency lines in your budget BEFORE you start your budget adjustment.
 - Ask for encumbered \$ to be released where necessary. For example, if you filled a position mid-year, alert your budget analyst so that they can un-encumber the appropriate salary and benefits.
 - If any pre-encumbrances need to be un-encumbered due to late placements or over-budgeting of Added-Duty work, contact your budget analyst.
 - Before moving funds, please ensure that employees have been compensated for their participation in Added-Duty activities such as PD, PLCs, and recruitment. If any payments are outstanding, please contact your budget analyst for guidance.
 - It is important to retain funding for any planned future Added-Duty and Off-Contract pay.
 - Note that ePAR position requests do not require separate budget adjustments. Your budget analyst can process that budget adjustment together within the ePAR position request, but the school needs to specify where the money would be coming from.
 - The school needs to create budget adjustments (modifications) when moving monies to have budget available for purchased items (i.e., the creation of a requisition/PO is required).
 - When making budget adjustments (modifications) that collapse unfilled positions, make sure to write an explanation in the "Notes" section (especially if you want to retain budgeting for that position during the 2016/17 school year).
 - If you need to find a budget line, use the Chart of Accounts found at <http://intranet/financedept/chart.asp>.
- ✓ To ensure expediency, always cc at least one other staff member from Finance when making any request [Nancy Mueller, Pam Wolfe, Ben Martinez, Suzanne Miller, Amy Emmendorfer].
- ✓ If you need help with using iVisions, please contact your budget analyst.
- ✓ Clarification was provided on how to amend Magnet School Plans to accurately reflect budget expenditures. The Magnet Department also provided clarification on 2016-17 plans.

2/8/2016

Appendix 3.3 Open Lab Flyer



Need help navigating the iVisions Purchasing & Financial modules?

If you have completed the iVisions DAC training but still need assistance to better understand the Purchasing & Financial part of iVisions for things like how to enter a requisition or revision, receive product, solve a budgeting problem, or EPARs, then these labs are for you!

We've made it easy to attend by scheduling them in conjunction with the Office Manager Training in April & May at the Duffy Family & Community Center, 5145 E. 5th Street. Staff from Purchasing, Human Resources, Budget, and Student Finance will be holding three open labs to help you get started. *This is hands on training so please bring the things you are currently working on and need to input.*

WEDNESDAY, MAY 4, 2016: 1-4 pm
WEDNESDAY, MAY 11, 2016: 1-4 pm
WEDNESDAY, MAY 18, 2016: 1-4 pm

While this is a walk-in opportunity, there is limited availability for each session so to ensure your seat, please sign up for the class you plan on attending using the Professional Learning Portal (course # 12711).

If you have any questions, please contact the Purchasing Department at 225-6080.

Appendix 4.1 Governor's Classrooms First Council Meeting Agenda



CLASSROOMS FIRST INITIATIVE COUNCIL

October 29, 2015

2:30 p.m.

Duffy Family Community Center
Governing Board Room
5145 E. Fifth St., Tucson, AZ 85711

1. Welcome
2. Approval of October 8, 2015 Minutes
3. Public Comments
4. Next Meeting: November 19, 2015
5. Adjourn

COUNCIL MEMBERSHIP

Governor Doug Ducey
Co-Chair

Jim Swanson
Co-Chair
President/CEO Kitchell

Alicia Alvarez
Principal
Leona Group, LLC.

Susan Chan
Charter Operator
Kingman Academy

Annie Gilbert
Director of School Operations & Finance
Ball Charter Schools

Greg Miller
President
State Board of Education

Brian Capistran
School Superintendent
Glendale Union School District

Janna Day
President
State Board for Charter Schools

Kenneth Hicks
Chief Financial Officer
Peoria Unified School District

Dawn Wallace
Education Policy Advisor
Governor's Office

Tim Carter
County School Superintendent
Yavapai County

Diane Douglas
Superintendent of Public Instruction
Arizona Department of Education

Beth Maloney
Teacher
Dysart Unified School District

Appendix 4.2 11/16/15-Your Voice Legislative Advocacy Info Session at Tucson High School

<https://www.youtube.com/watch?v=mnM8jyxKdiA>

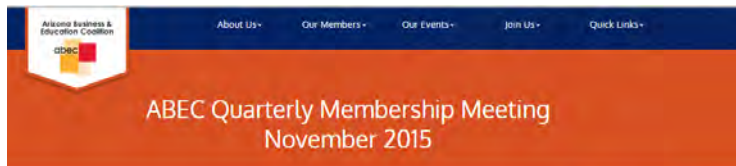


Appendix 4.3 11/19/15-Diane Douglas-"We Heard You Tour" at Catalina High School

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



Appendix 4.4 11/20/15- ABEC (AZ Business & Education Coalition) Meeting at Santa Rita High School



Share:

Name: ABEC Quarterly Membership Meeting November 2015

Date: November 20, 2015

Time: 10:00 AM - 1:30 PM MST

[Register Now](#)

Event Description:
ABEC Quarterly Membership Meeting

Back to Calendar

Location:
Tucson Unified School District
Santa Rita High School
3951 S. Pantano Rd
Tucson, AZ 85730

OUTSIDE OF TUCSON: I-10 to KOLOB Exit, go north on KOLOB to Golf Links, right on Golf Links to Pantano, right on Pantano to Escalante, High School is on your left.
If you take Broadway you will have to go through the downtown area.

IN TUCSON (if you so choose): East on Broadway to Swan Road, right on Swan Road to Golf Links (left (east) on Golf Links to Pantano, right on Pantano to Escalante, High School is on your left.

[View a Map](#)

Date/Time Information:
Friday, November 20, 2015
10:00am to 1:30pm

Contact Information:
Karen KeltnerBach Before the meeting
dtt: 602-264-4399; Day of the meeting: 602-228-1589
[Send an Email](#)

Fees/Admission:
Open to all current ABEC members at no charge.
You must be registered for this meeting.
Contact Karen at kkel@abec.org to register your organization if you have any special requirements.
ABEC

Appendix 5.1 Tax Credit Training Flyer

HOW TO INCREASE AND PROMOTE YOUR TAX CREDIT PROGRAM AND OTHER FUNDING SOURCES

At a time when school funding is limited, it is essential to understand how to maximize all of your funding resources. Join us at this workshop to gain valuable knowledge and tools that will help:

- ⇒ Schools define goals of extracurricular activities/programs offered for their students
- ⇒ Schools understand tax credit requirements and how these funds can achieve their goals
- ⇒ Schools identify other types of funding sources and learn how they can supplement tax credit funds



Workshop Training Schedule:

Date: Tuesday, May 17, 2016

3:00pm-5:00pm

for Site Council Facilitators and Principals

5:30pm-7:30pm

for PTO/PTA Representatives & Parent
Booster Representatives

Location: Duffy Community Center MPR
655 N Magnolia Ave, Tucson, AZ 85711

Please RSVP via email to
sarah.tarin@tUSD1.org or call
520-225-6493

About Heinfeld, Meech & Co.

Heinfeld, Meech & Co., P.C., CPAs and Business Consultants, has been providing accounting and auditing services to Arizona school districts for over 28 years. We are frequent speakers at events sponsored by the Arizona Association of School Business Officials, ASBO International, American Institute of CPAs, and Association of Government Accountants.

Learning Objectives

This workshop will provide attendees with an understanding of how to maximize outside funding sources while complying with policies and procedures for TUSD and the state of Arizona.

Questions? Contact TUSD Student Finance
Manager: Julie Versluis: 520-225-6123 or
Julie.Versluis@tUSD1.org

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Appendix 5.2 TUSD Professional Learning Portal Tax Credit Class

Tax Credit Program: Maximize Tax Credit Dollars

Home ▶ Tax Credit Program: Maximize Tax Credit Dollars: T...

Navigation

Home

- Dashboard
- ▶ Site pages
- ▼ Current course
 - Tax Credit Program: Maximize Tax Credit Dollars: T...**
 - ▶ Participants
 - ▶ Badges
 - PLEASE READ INSRTUCTIONS BEFORE BEGINNING THIS MODULE
 - ▶ Tax Credit Program: Maximize Tax Credit Dollars
- ▶ My courses

Administration

- ▼ Course administration
 - Grades

General

First view the [Tax Credit Program: Maximize Tax Credit Dollars](#) below under Topic #1. Then you must take the quiz under Topic #2 in order to complete this module. Your score must be 100% in order to successfully complete this course.

PLEASE READ INSRTUCTIONS BEFORE BEGINNING THIS MODULE

 [Tax Credit Program: Maximize Tax Credit Dollars](#)

Tax Credit Program: Maximize Tax Credit Dollars

 [Tax Credit Program: Maximize Tax Credit Dollars Quiz](#)

Appendix 5.3 TUSD Tax Credit Training Livestream Video

<http://livestream.com/tucsonunifiedlive/events/5411304>