



2015-16

## Year End Summary

For the Period Ending June 30, 2016

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Administrative Services

September 13, 2016

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This and other financial & Budget documents of the Visalia Unified School District are posted on the  
web site:

[www.vusd.org](http://www.vusd.org)

For questions, please contact Kyla Surratt, Finance Director at (559) 730-7534 or [ksurratt@vusd.org](mailto:ksurratt@vusd.org)

# Board Members

Board President – John L. Crabtree, Area 4  
Board Clerk – Donna Martin, Area 5  
Member – William A. Fulmer, Area 7  
Member – Juan Guerrero, Area 2  
Member – Jim L. Qualls, Area 3  
Member – Charles Ulmschneider, Area 1  
Member – Lucia D. Vazquez, Area 6

Additional information regarding the governing board is available at [www.vusd.org](http://www.vusd.org)

# Administration

Todd Oto, Ed.D. – Superintendent  
Robert Gröeber – Assistant Superintendent, Administrative Services  
Tamara Ravalín, Ed.D. – Assistant Superintendent, Human Resources Development  
Melanie Stringer – Assistant Superintendent, Instructional Services  
Judy Burgess, Ed.D. – Area Superintendent K – 8  
Jacquie Gaebe – Area Superintendent K – 8  
Jeff Hohne – Area Superintendent 9 – 12  
Nathan Hernandez – Chief Financial Officer  
Dedi Somavia – Administrator, Human Resources Development

Report prepared by: Kyla Surratt, Finance Director



# BELIEFS of the Visalia Unified School District

**WE EXIST TO PROVIDE STUDENTS WITH AN EDUCATION THAT AFFORDS THEM LIMITLESS OPPORTUNITIES FOR THE FUTURE**

## **We Believe ...**

### **EVERY STUDENT CAN LEARN**

*Every child can engage in rigorous learning and can achieve at high levels.*

### **LEARNING IS CONSTANT, TIME AND RESOURCES ARE VARIABLE**

*Our focus is on learning, not just teaching. We will support students and adults to ensure that learning occurs.*

### **WE WORK IN TEAMS**

*Together, we can do more and better.*

### **FAMILIES HAVE THE MOST INFLUENCE IN A CHILD'S LIFE**

*The family is profoundly important in a child's emotional, social, and cognitive development.*

### **THE TEACHER IS THE MOST INFLUENTIAL PERSON IN A STUDENT'S EDUCATIONAL LIFE**

*The teacher-student relationship is the most important one in our organization.*

### **THE PRINCIPAL IS THE MOST INFLUENTIAL PERSON IN THE SCHOOL**

*The site principal leads and coordinates the services that support the teacher-student relationship.*

### **EVERY PERSON IN OUR SCHOOL COMMUNITY HAS VALUE**

*We respect and value every person who engages in our community.*

### **WE ARE ALL ACCOUNTABLE FOR EVERY STUDENT'S FUTURE**

*Each of us has an important role in the development of children.*

### **THE DIVERSITY IN OUR COMMUNITY IS AN ASSET**

*The students who attend our schools and their families are diverse in many ways, and we value the qualities that this diversity brings to our schools and to our community.*

### **ETHICS MATTER**

*We must develop the highest ethical standards in our students and model those standards ourselves. Our values include hard work, excellence, perseverance, trustworthiness, caring, responsibility, respect, fairness, and citizenship.*





# District Wide GOALS for 2016~17

**WE EXIST TO PROVIDE STUDENTS WITH AN EDUCATION THAT AFFORDS THEM LIMITLESS OPPORTUNITIES FOR THE FUTURE**

**To attain this goal, our organization will:**

**1. ENGAGE STUDENTS IN A CHALLENGING CURRICULUM AND PROVIDE THEM THE SUPPORT TO BE SUCCESSFUL**

- 1.1 - Maintain consistently high academic standards in a curriculum that is relevant to each student's chosen path*
- 1.2 - Provide equitable opportunities for every student to succeed*
- 1.3 - Provide systematic and reliable access to services that support academic, social, and emotional development*

**2. SUPPORT A DISTRICT-WIDE COLLABORATIVE CULTURE FOR STUDENTS AND ADULTS FOCUSED ON LEARNING AND RESULTS**

- 2.1 - Establish a district-wide professional learning community*
- 2.2 - Engage the community fully as a partner in the education of students*
- 2.3 - Provide systematic and relevant opportunities for parents to participate in the education of their children*
- 2.4 - Communicate effectively with parents and the community*

**3. MAINTAIN A CARING AND ENCOURAGING LEARNING ENVIRONMENT FOR STUDENTS AND ADULTS**

- 3.1 - Ensure safe, secure, healthy, and positive environments that promote a sense of significance and belonging*

**4. RECRUIT, HIRE, AND RETAIN HIGHLY QUALIFIED, TALENTED, AND PRODUCTIVE STAFF**

- 4.1 - Aggressively recruit and hire highly qualified staff members who reflect the demographics of our students and community*
- 4.2 - Ensure competitive salary and benefits for all staff*
- 4.3 - Provide systematic and relevant certificated, classified, and management support services*

**5. ALIGN RESOURCES TO SUPPORT DISTRICT GOALS, STUDENT ACHIEVEMENT, AND SCHOOL SITES**

- 5.1 - Effectively manage resources to strengthen our fiscal foundation, maintain prudent reserves, and meet funding requirements for retiree health insurance and increases to employee retirement systems*
- 5.2 - All schools, facilities, and grounds will be clean, safe, secure, and well-maintained*
- 5.3 - Refine VUSD facility plans to align with the Measure E Implementation and Facility Master Plan*
- 5.4 - Plan for and open new schools that support the strategic interests of the district and the community*
- 5.5 - Maintain total transparency in all services and projects and be accountable to the community*



# Our Vision of a Visalia Unified Graduate



## **Critical Thinker**

- Looks at things from different perspectives
- Questions, analyzes, and perseveres
- Explores and values multiple solution pathways
- Makes reasoned and logical judgments
- Evaluates the relevance and reliability of information
- Builds new ideas or thinking
- Makes good choices



## **Collaborative**

- Leverages team members' strengths
- Values diverse thinking
- Focuses on shared outcomes
- Listens actively
- Shares responsibility but holds individuals accountable
- Is a productive member of a group



## **Communicator**

- Understands and attends to audience and purpose
- Uses multiple formats (oral, written, presentation, video)
- Understands visual cues and contextual nuances
- Is expressive and receptive of thoughts, questions, ideas, and solutions



## **Creative**

- Allows exploration of new approaches to problems
- Thinks fluidly to build meaning
- Opposes fear of failure by sparking innovation
- Supports "mental plasticity"



## **Civic-minded**

- Makes ethical choices
- Is a contributing member of the community
- Is informed and law-abiding
- Participates and votes
- Is concerned for the greater good
- Celebrates the success of others
- Is positive in outlook and has a growth mindset



# Executive Summary

## The Year in Review

Schools districts completed their third year under the Local Control Funding Formula (LCFF) in 2015-16. As in the two prior years, the LCFF gap funding percentage was revised by the state several times during the budget development process. The Governor's January 2015 budget proposal for the 2015-16 year initially proposed closing the gap between the 2014-15 LCFF funding level and full LCFF implementation targets by 32.19%. That figure increased significantly with the May Revise budget proposal to 53.08% and settled at 51.52% under the enacted budget signed by the Governor in June 2015. The LCFF gap funding percentage continued to fluctuate slightly during the year based on various factors at the state level with the final number being 52.56% at year end. This final change brought Visalia Unified nearly 90% of the way toward full LCFF implementation.

As a refresher, the LCFF created base, supplemental, and concentration grants in place of most previously existing K-12 funding streams, thus eliminating revenue limits and approximately three-quarters of state categorical (restricted) programs. This streamlined funding results in more flexibility for school leaders, with the assistance of parents and other local stakeholders, to determine the local academic priorities and how the state funding will be used to improve student achievement so that they graduate from high school and are college and career ready.



As part of this new funding model, VUSD is required to develop, adopt, and annually update a three-year Local Control and Accountability Plan (LCAP). The LCAP is required to identify annual goals, specific actions, and measure progress for student subgroups across multiple performance indicators, including student academic achievement, school climate, student access to a broad curriculum, and parent engagement.

California State Teachers Retirement System (STRS) and California Public Employees Retirement System (PERS) rates paid by the district in 2015-16 increased over the prior year. The STRS rate increases were implemented by the state to offset shortfalls in the retirement program. The percentage of salary contributed to STRS by the district on-behalf of its teachers rose from 8.88% in 2014-15 to 10.73% in 2015-16. School district STRS contribution rates are expected to continue to climb annually until 2020-21 when they are projected to reach 19.10%. PERS retirement rates for classified staff also grew slightly in 2015-16, going from 11.77% in 2014-15 to 11.847% in 2015-16. PERS rates are expected to increase to 19.80% by 2020-21.



# Highlights of 2015-16

- Continued reduction in class sizes Districtwide
- Implementation of the Local Control and Accountability Plan using supplemental and concentration (targeted) funds to improve services across the District by expanding student opportunities for learning, after-school enrichment and behavior support and intervention
- Implementation of Linked Learning Academies at all the four comprehensive high schools and VTEC with open enrollment for incoming freshman at those academies
- Continued planning of Measure E projects, construction of the new middle school, opening of the Redwood academic building and modernization and safety projects throughout the District
- Completed Phase II of Solar Installation at 6 sites
- Received a First 5 grant to continue improvements at the Preschool program at Crestwood Elementary school
- Began construction on a new northwest elementary school funded with Developer Fee's and General Fund





# 2015-16 Department Highlights

## Administrative Services

### Budgeting & Attendance Accounting

Budgeting is committed to providing sound financial planning to ensure effective decision making in support of the District's educational and financial goals. The budget reflects the labor and material resources required to fulfill the goals and objectives outlined by the Board. The budget serves as an operational plan, stated in financial terms, for carrying out the goals of the school system.

The District-wide budget development process is a collaborative process involving many stakeholders including school site personnel, School Site Councils (SSCs), department managers and directors, Finance, the Superintendent and Cabinet, and the Board of Education. The budget preparation process begins each year in January and continues through June with the adoption of the budget by the Board of Education. The budget is then brought back to the Board at First and Second Interim in December and March.



Attendance Accounting is required to ensure that students meet compulsory attendance laws. The State mandates that "All students between the ages of six and eighteen are required to be enrolled in school." The District is responsible for the whereabouts of students enrolled in the district. Student attendance is very important as it generates approximately 70% of the district revenues. In addition average daily attendance (ADA) serves as the basis for site based allocations. Maintaining accurate, reliable, and auditable attendance records is, therefore, critical to the district.

Budgeting maintained approximately \$365 million for all 17 District funds.

Attendance Accounting tracked attendance for approximately 28,186 students which totaled 5,073,480 days. The estimated 2015-16 revenue limit per ADA is 8,567.95 or \$47.60 per day.

### Business Information Systems

Business Information Systems Division (BISD) provides and supports the primary Financial/Human Resources information system (BIS), the Service Request Tracking System (SRTS), the Process Automation System (PAS), an Epsilon interface for online purchasing, and custom software used to meet unique VUSD needs. All VUSD staff are served in one or more ways. The BIS produces mandatory reports required to meet specific regulatory agency requirements including PERS, STRS, Franchise Tax Board (FTB), Employment Development Department (EDD), Social Security Administration (SSA), Internal Revenue Service (IRS), and Tulare County Office of Education (TCOE). The BIS is also used

to produce all district warrants and provide for production of employee W-2's and Affordable Care Act (ACA) reporting data.

The SRTS is used by all district personnel while the Epylon online interface is used to purchase supplies electronically by over 900 district employees. District managers are provided access to budget, purchasing, expense, and employee absence information via the BIS. BISD developed and supports custom software used by Finance, HRD, State/Federal Projects, and Special Education departments for unique VUSD needs. BISD staff continues to support automated work flows for restricted funds use credit card approvals and print ship orders through the PAS system. A large effort was put into establishing the new platform required for BIS and migrating all databases to this platform which provides for better data access, reduced costs, and longevity not available on the old platform. BISD drafted technical requirements for a 21<sup>st</sup> Century Finance/HR system which can better meet VUSD needs now and into the coming years.

### Energy Conservation

The Energy Specialists work to establish accountability for energy consumption at every level in the District. They are responsible for developing and monitoring the District's Energy Management



Program under the Board approved policy & guidelines to reduce overall utility consumption. The Energy Specialists work with all sites within the District to ensure equipment is operating efficiently, thus maintaining optimum educational environments. The district Energy Specialists also ensure overall compliance with the District's energy conservation policy and guidelines.

maintaining VUSD's Energy Cap Data Base, which includes all Electric, Gas, water, and sewer consumption records; they also work closely with our utility providers to ensure that District utility meters are assigned to the most beneficial utility rate schedules. The Energy Specialists are instrumental to the success of the energy conservation program and ensuring the retention of district funds for use district wide.

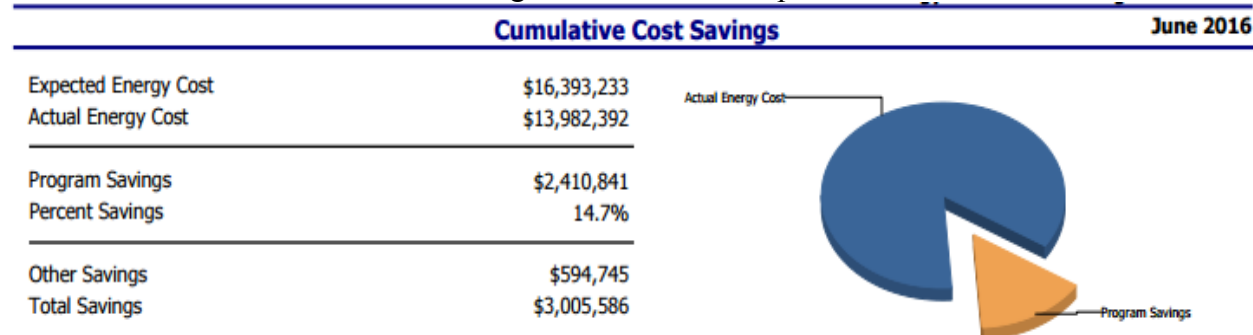
As a result of ongoing and concentrated efforts to reduce energy consumption, Greenhouse Gas Emissions, and through a partnership with EPA's voluntary Energy Star program; VUSD received Energy Star Certification for 33 for district sites. The EPA only awards Energy Star Certification to those buildings that are performing within the top 25% of similar, energy conscious, buildings nationwide.



**2016 ENERGY STAR  
CERTIFIED BUILDING**

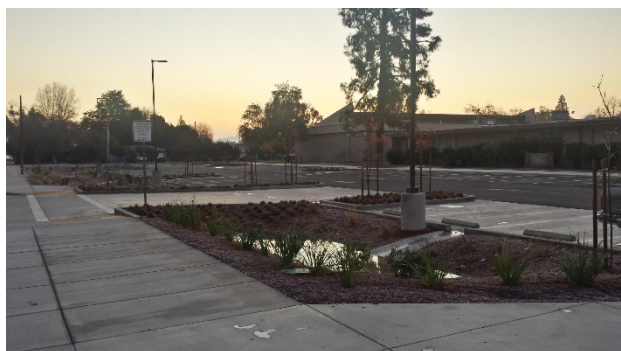
Through the District's energy conservation program, we as a District were able to reduce 2,579 Metric Tons of Greenhouse Gas emissions; which is the equivalent of removing 537 cars from the road for one

year or planting 66,126 trees. All of this was accomplished during the period of September 2013 – June 2016. Below is a cumulative cost savings for the same time period.



## Facilities

The 2015-16 school year was a big year for Measure E. The new Redwood Academic Building opened its doors for students in August providing some much needed classroom space on that campus. The new building matches the existing architecture and blends in seamlessly with the rest of the campus. The Divisadero parking lot was also completed and made a big impact to the curb appeal of Divisadero Middle School. Access is now much easier and with the completion of the single point of entry over the summer the campus can be fully secured. Buses have been relocated to a dedicated drop off to the west keeping buses and drop off traffic/walkers separated.



Continuing with Measure E the Golden West Music Building was completed during the year and the impact was felt immediately on the campus. The focus of the project was to improve the acoustics of the building and reduce the amount of sound transfer between rooms. This was accomplished and more.

New finishes were installed including new tack board, polished concrete and carpet along with a new HVAC system that will provide a more stable environment. The building now looks and functions great.

The flagship project under Measure E, Ridgeview Middle School, is preparing for kids this fall. The new campus features polished concrete floors, multiple monitors in each room, synthetic turf amphitheater, 21<sup>st</sup> century furniture, a full gymnasium/locker room and will be ready for the inaugural 7<sup>th</sup> grade class.



More projects outside of Measure E were underway this year. The first phase of Prop 39 energy efficiency projects started this summer. La Joya and Ops I had several HVAC units replaced along with the installation of



occupancy sensors and LED retrofits. Phases 2 & 3 are set to begin the next 2 summers to align with campus modernizations and program funding.



Glendale and Giddings is in full swing as construction began last April. The elementary school campus is located adjacent to the City of Visalia's regional sports park and is scheduled to be open August 2017.

### Finance

Finance manages all aspects of district financial operations including general accounting, internal control, accounts

payable, accounts receivable, payroll, and retirement reporting.

Accounting is responsible for paying District invoices, employee reimbursements, collecting and depositing cash receipts, monitoring student activity funds, and reconciling the District's bank accounts. Accounts Receivable is responsible for maintaining records of all monies owed to the District as well as sending out monthly invoices. Payroll is responsible for paying nearly 4,000 employees including full-time, part-time, temporary, substitute, and student employees. In addition to employee compensation, Payroll is responsible for monthly retirement reporting to California State Teachers Retirement System (CalSTRS), California Public Employees Retirement System (CalPERS), and Public Agency Retirement Services (PARS). Internal Control includes monitoring District financial and program compliance, researching federal and state laws and regulations, assisting in establishing policies and procedures that enhance our District operations, and making public information accessible to interested parties.

During FY 2015-16, Finance provided the following services:

- Conducted internal audits on all four of the high schools Associated Student Body (ASB)
- Provide monthly cash flow monitoring and reporting to the Board

Additionally, Finance issued the following:

- 11,776 Accounts Payable warrants
- 6,815 Payroll warrants
- 36,090 Payroll Automatic Payroll Deposit
- 111 1099's
- 4,366 W-2's

### Maintenance & Operations

Maintenance & Operations, which is comprised of custodial, grounds, and maintenance activities, is responsible for maintaining and cleaning all District facilities. Custodial Services is comprised of 140 employees, which is comprised of traveling teams, stationary teams, site and gym custodians, and custodial supervisors. The majority of the cleaning is performed by the night crews; each team cleans an average of 115,500 square feet per night. In addition, we have been assigned to the beautification of our schools.

Grounds maintained and serviced over 1,750 pieces of equipment and provided garden areas for all elementary school sites. Service and coverage was also provided to over 150 events in our two stadiums, as well as service and equipment to District sponsored “outside events” such as the Waiters Race, Taste of the Arts, and Police Motorcycle Rodeo. Grounds also provided irrigation and pest control to 40 sites, emergency tree service and annual pruning for our school sites. Lastly, grounds is responsible for providing clean and well balanced pools for students and the community.



Maintenance & Operations undertook several projects this past summer. These projects include the typical flooring replacements, asphalt/concrete replacements, lighting improvements, roofing, and fencing. There were also several larger projects that were completed as well. The Washington Office was remodeled to create a better workflow and increase the usable space.

Modular classrooms were added to 12 sites this summer for grade span adjustments and increased enrollment. Track repairs and resurfacing was also completed at all four high schools.

### Nutritional Services

Nutritional Services operates the School Breakfast Program, the National School Lunch Program, and the After-School Snack Program throughout the District. The department also operated the Fresh Fruit and Vegetable Program (FFVP) grant at 4 sites.

The 2015-16 school year opened with three (3) newly remodeled High School kitchens and student serving areas. Redwood, Golden West, and Mt. Whitney High Schools now have modernized and updated kitchens that will improve efficiency and safety. The trendy new student serving areas allow students to view all their meal options while quickly getting through the busy meal line.



Nutritional Services, as in prior years, continues to partner with Ag Link and several local produce vendors to ensure the procurement of produce from local farmers for our produce stands, salads, and wraps. During the 2015-16 school year, the Nutritional Services Department purchased seasonal, fresh, local produce such as grapes, oranges, peaches, nectarines, and plums.

Nutritional Services has been working closely with Facilities to prepare for the opening of VUSD’s newest school, Ridgeview Middle School. A full cooking kitchen is being built, staff is being hired, and equipment is being purchased, all to ensure that the students of our newest school will receive nutritious and safe school meals. A new delivery truck will also be purchased to ensure that meals will be delivered safely and on time to Ridgeview’s satellite serving sites.

The 2015-16 school year also marked the 2<sup>nd</sup> year that Visalia Unified, Custodial Services, and Nutritional Services Department worked with the City of Visalia to continue managing our composting program. Several school districts have visited our sites and are looking to Visalia Unified as an example of how to properly run a composting program.

During 2015-16, Nutritional Services served 942,847 breakfasts, 2,597,821 lunches, and just over 86,500 after-school snacks. The FFVP grant program served over 55,000 pounds of fresh fruit and/or vegetable snacks during the 2015-16 school year combined at the 4 participating sites.

### Print Shop & Mail Distribution

Print Shop has settled in at the new student support services building. The new copy machines have proven to increase production and efficiency. They are also working through the implementation of a new web submission software program. There will be significant benefits for all users, site administrators, District administrators, and Print Shop staff as the new strategy is implemented. The benefits include improved device performance, increased visibility into order status by the users, a more efficient method for approving orders, and reduced turnaround times.

The Print Shop provides printing, mail services and screen printing among other services to each of our sites and departments. They printed over 26,579,066 copies using 24,363,143 feet of paper (that's 4,614 miles of paper!) and 17,000 custom t-shirts. Duplicating also printed and prepared over 160,000 pieces of bulk mail, a typical savings of \$0.30 per piece to the District (over \$45,000 savings when compared to first class mail).

### Purchasing

Purchasing serves many functions besides purchasing for the District's schools and departments. We also coordinate the bid procedures, process all vendor information, maintain asset inventory, conduct disposal of surplus District property, and manages the Print Shop and mail delivery and processing services for the District. Our purpose is to maintain continuity of services and supplies to support various school sites and departments that enable them to provide their services to our students and our community; and to also purchase at the lowest cost consistent with the quality and quantity required. Lastly, maintaining an open line of communication and dedicated assistance to schools and district staff, parents, students, vendors and the business community is a very important standard we like to adhere to.

During the 2015-16 school year, the Purchasing Department processed 25,611 Purchase Orders. In an effort to get the best price, the purchasing staff requests quotes from various vendors when the school site submits a requisition. Through this process, we saved approximately \$152,596. It is the District's policy to solicit and obtain competitive bids and quotations. The bidding process saved the general fund approximately \$2,007,467 with just 10 bids. Also, we awarded contracts totaling approximately \$5,248,999 for facility projects and nutritional services. In addition, we ensure that all Public Works projects over \$25,000 have a performance and payment bond for 100% of the total cost of the project. This guarantees satisfactory completion of a project by a contractor and that all labor and material will be paid by the contractor.

Purchasing works close with the Maintenance department to ensure the furniture in all facilities are safe for employees, students and the community. In the summer of 2015, we added 22 modulars and 43



classes at various sites to support enrollment growth and all-day Kindergarten. The District's goal is to create 21<sup>st</sup> Century learning environments using new flexible furniture that fosters collaboration and supports the new curriculum. To this end, we ordered new 21<sup>st</sup> Century furniture for these additional classrooms totaling approximately \$181,186 and plan to do so for furniture replacement as needed.

As part of the furniture replacement plan, we aid in the removal of surplus furniture. When a school site receives new furniture or does not have a use for an item, we try to utilize all of our options to remove the furniture by way of offering to another site, auction, or disposal. We have partnered with Tulare County Surplus Store to remove the furniture, sell it and in return we receive 70% of the profit. Through these recycling efforts we saved the District over \$72,000. We also utilize the Public Surplus website to auction furniture and equipment. This is a great tool because we can reach a bigger audience. This year we sold over \$28,000 in surplus vehicles and equipment that was funneled back into general fund.

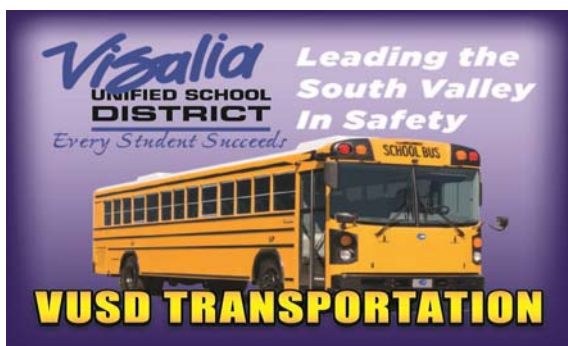
### Technological Services

Technology Services staff is committed to providing the resources, training and support to ensure that all VUSD schools reach a consistent technology standard that enhances the teaching and learning process with each classroom through the effective use of technology.



#### Tech Services:

- Processed 11,000 SRTS service requests
- Implemented third district-wide Chromebook deployment; approximately 6,500 units
- Completed upgrade of wired network hardware and began district-wide upgrades of wireless network
- Added two staff members (computer technicians)
- Implemented take-home device (Chromebook) pilot
- Performed telephone line/use audit and implemented changes to reduce communications expenses
- Continued support and deployment of centralized printing initiatives



### Transportation

The Transportation fleet is comprised of over 90 buses and traveled more than 819,000 miles in 2015-16. The department provides several types of services to our students from home-to-school, athletics, special needs, extra-curricular, after school tutoring, as well as serving several other programs throughout our district as well as neighboring districts.

2015-16 marks the introduction of a “new era” in school pupil transportation services for VUSD. The creation of “TRANSPORTATION NATION!”, a culture of positive flow and high energy, comprised of Safe, Effective, and Efficient [S.E.E. 1 Program] transportation service for our students. Further enhanced by the implementation of the [S.E.E. 2 Program] which promotes Strength, Empowerment and Enrichment of our employees. Creating a culture and style that is complimentary in nature and

thoroughly effective in our objective to provide the safest, best transportation service, ever recognized in the State of California.

The District also supplies and maintains the staff with over 220 white fleet vehicles. Maintenance for all District vehicles including over 100 buses, is provided by a highly trained vehicle maintenance staff of six technicians. Our team of mechanics have logged over 5,900 maintenance repair hours; which means our transportation maintenance team is one of the safest, most effective and most efficient in the State of California.

In 2015-16 Transportation hired:

- 12 staff replacements/Additions
- 6 drivers
- 1 Dispatcher/Driver (Lindsay)
- 1 Certified School Bus Instructor
- 2 Behind the-wheel delegates
- 1 Executive Assistant/Office Manager
- 1 Shop Foreman

In 2015-16 over 800 hours of training was provided for 100 drivers including VUSD, Lindsay, Stone Corral, Mid-Valley Charter, Oak Valley, Buena Vista, Farmersville, Tulare Joint UHSD, Orange Belt Stages; as well as other outside districts. Furthermore, several of our staff were provided with different opportunities for professional development.

- 1) 35 VUSD transportation nation members were provided the opportunity to participate in the California Association of School Transportation Officials (CASTO) school bus drivers annual conference. This very interesting and exciting professional development opportunity paved the way to a positive and constructive channel to develop our team's skills.
- 2) Staff members were sent to CDE in Sacramento, to develop their skills in several areas such as; Special needs transportation, behind the-wheel delegation training and school bus instructor refreshers courses.

VUSD is unique in the fact that the transportation department oversees its own charter service. Operating as Mid-Valley Charter; the service provides transportation to several neighboring districts for all aspects of school pupil transportation. Mid-Valley Charter has consistently produced revenues over the cost of doing business. Traveling over 73,000 miles last year, Mid-Valley Transportation continues to be the leading catalyst for safe school pupil charter transportation for the entire south valley.

2015-16 Transportation Statistics:

- Home to School miles traveled: 588,590
- VUSD Extra-Curricular miles traveled: 83,365
- Mid-Valley Transportation miles traveled: 147,045
- Extra-Curricular activity trips: 2,586
- Home to school passengers transported: 6,978 per day
- Special needs students transported: 117 per day

# Human Resources Development

The Human Resources Development Department is composed of several divisions and served over 2,800 regular employees during the 2015-16 fiscal year. This included:

- 1,275 Teachers and Counselors
- 1,287 Classified Staff
- 33 Psychologist and Nurses
- 144 Certificated Managers
- 76 Classified Managers
- 3 Confidential Employees



Additionally, the department served over 600 substitute employees and approximately 250 volunteer coaches as well as hundreds of other employees who serve on a temporary or short-term basis. Three of our Human Resources Development Divisions are highlighted in this report. These are the Certificated Support Services Division, the Guest Teacher and Substitute Support Services Division, and the Benefits, Leaves, and Risk Management Services Division.

## Certificated Support Services

The Certificated Support Services Division of VUSD's Human Resources Development Team provides mentoring, support, and training to teachers who are new to the profession, completing credentialing requirements, and those in need of additional support services. Each certificated staff member who is new to Visalia Unified is matched with an experienced and well-trained mentor from our "Mentor Network".

Mentors are teachers who hold a clear credential, have served as a teacher at VUSD for at least three years, have the willingness to assist a colleague, and receive District training in leadership, cognitive coaching, and working with adult learners. The training begins at the "Mentor Summit" which takes place in conjunction with the



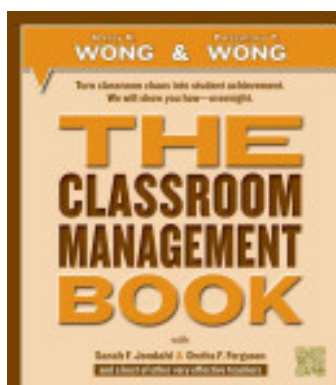
summer training week for new certificated staff. The training provides the mentors with camaraderie as a support unit as well as important skills in how to determine the needs of a new teacher and how best to create meaningful experiences to ensure each new teacher grows in their classroom practice.



Each mentor receives a \$2,000 stipend for the year for their work with their mentees which includes but is not limited to:

- Observing the teacher and providing feedback
- Meeting weekly to provide support
- Assisting with lesson planning
- Modeling lessons
- Organizing and accompanying teachers on tours of other classrooms
- Attending monthly networking meetings
- Attending mentor training to keep their skills relevant.

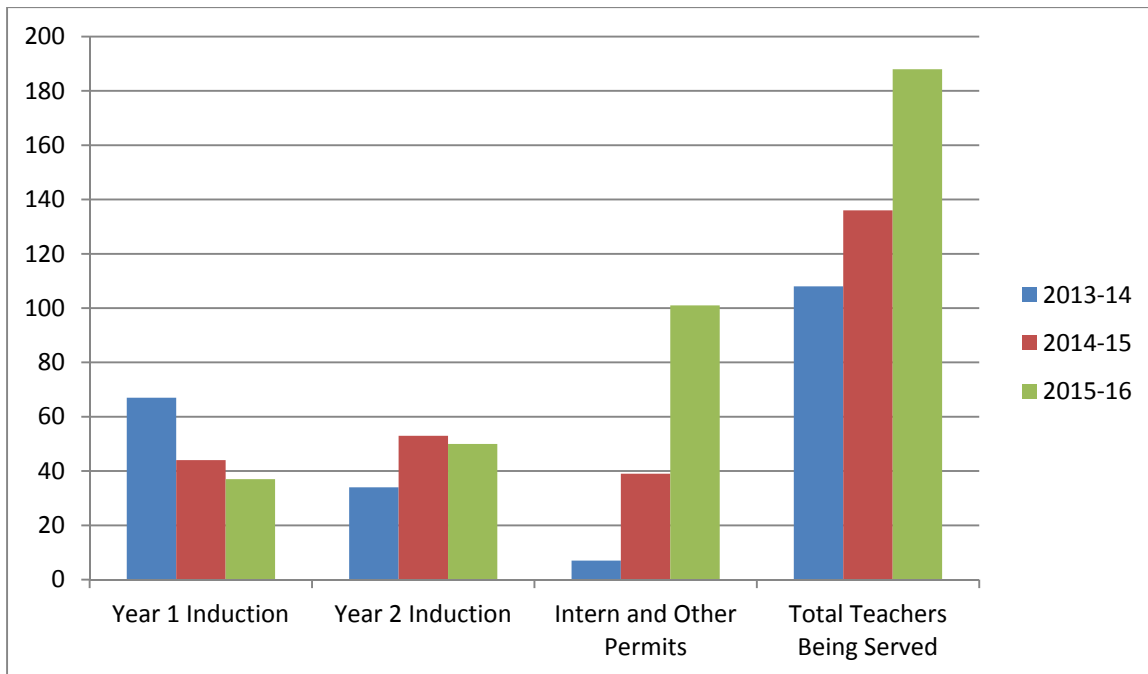
This support compliments the VUSD goal of recruiting and maintaining high quality teachers. All new teachers, including those in the clear credential program, receive these services free of charge as part VUSD's philosophy of support.



New certificated staff not only receive assistance from one-to-one mentors, but they also receive training in classroom management, cultural responsiveness, routines and procedures, working with adults, creating a positive classroom environment and working with diverse populations such as special needs students, English Learners, and advanced learners. These trainings are offered once per month over the course of two years or more depending on their credential status. The training begins the week before school starts each summer in collaboration with Curriculum. Harry Wong's latest book is provided as a resource to all teachers new to the district and is referenced throughout the new teacher experience.

The need for mentors and training has increased over the years as the shortage of teachers completing a traditional student teaching path is becoming more prevalent. Not only are the numbers of new teachers increasing, but the new teachers we are hiring at times come with little experience. Traditionally, a new teacher was hired having earned a preliminary credential through student teaching and coursework via an accredited university. As a support and benefit for these teachers, VUSD created its own Teacher Induction Program which is accredited by the California Commission on Teacher Credentialing. Since 2008, this program has provided all VUSD preliminary credential holders a two year induction experience which meets the requirement for the clear credential. Having a one-to-one mentor to guide each teacher through a series of action research projects is the core of the program.

In addition to guiding a new teacher through the credential program, mentoring has become more of a necessity, but out of a different need. Mentors are now called upon to serve in the role of a master teacher to those teachers who come with little experience. Essentially, our mentors focus on ways to provide job-imbedded student teaching. In the past the majority of the teachers we served were in their first or second year of Induction. Now, we have new certificated staff who hold a variety of permits and credentials including Intern program participants, short term staff permit holders, and preliminary intern permit holders. The chart on the next page shows the shift in the experience of the teachers we have hired through the 2015-16 school year. Note the increase in "Intern and Other Permits" over the years from less than 10 in 2014 to nearly 100 in 2016.



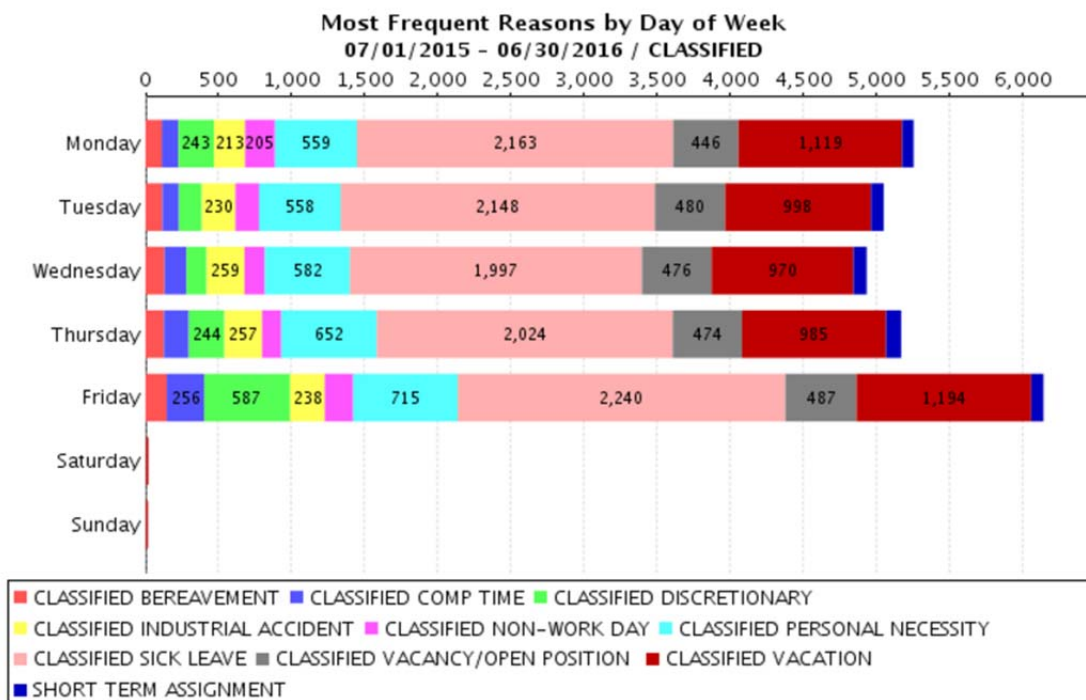
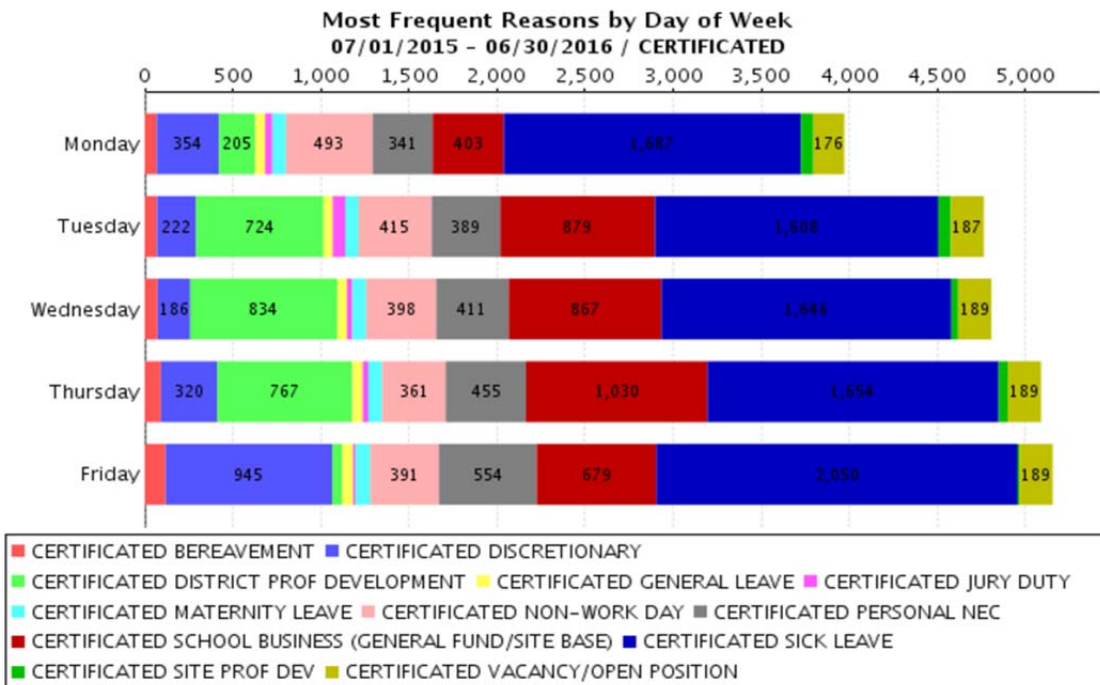
The cost of this effective support system has been written into the Local Control Accountability Plan (LCAP) and, most recently, has been provided for by the 3-year Teacher Effectiveness Grant. The costs for the 2015-16 year covered the supervisor salary, 2.5 teachers on special assignment salaries, \$2,000 in extra duty pay for each mentor who provided a new teacher with support, sub release costs, and other costs for supplies and resources. The philosophy behind the teacher support program comes from William Edwards Demming's work and can be summarized as "Plan, Teach, Reflect, Apply". It is this philosophy that drives the program. We are proud of the success of so many of our participants and the leadership of our mentors.

### Guest Teacher and Classified Substitute Support Services

The Guest Teacher and Substitute Support Services Division of VUSD's Human Resources Development Team secures guest teachers for our certificated staff members and substitutes for our classified staff members when they are absent from work. We work closely with the Curriculum and Instruction Division to provide guest teacher coverage for Professional Development activities off site as well as site based Professional Development. On an average day, Support Services provides substitute coverage for over 300 employees who are away from work. This includes employees who are out due to illness or a variety of other types of leave. We are continuously recruiting candidates to meet the needs of our District. In 2015-16, we hired 184 new Guest Teachers to add to our ever changing Guest Teacher Pool. In addition to the Guest Teacher Pool, we were engaged in ongoing work to hire more than 150 Classified Substitutes for a variety of substitute positions. Support Services provide support for divisions such as Instructional Services, Nutritional Services, Special Education, Custodial, Transportation, and Administrative Services. Currently we have approximately 420 active Guest Teachers to support certificated absences, and approximately 200 Classified Substitutes to provide support for classified absences.

The chart below is an overview of the types and frequency of reasons for absences. It gives a visual representation of the coverage we provide on a daily basis over the span of one year (2015-16). The information is disaggregated by reasons for absence, days of the week, and by Certificated and

Classified Staff. As you can see from the diagrams, we had over 20,000 certificated and over 25,000 classified absences during the 2015-16 school year. Again, these absences are for a variety of reasons and not all absences require substitute support.





## Benefits, Leaves, and Risk Management Services

The Benefits, Leaves, and Risk Management Services Division of Human Resources Development Department advises employees and coordinates leaves of absence and benefits for all employees of the District. The Division works collaboratively with all departments to mitigate work place injuries and accidents and to provide training to all District employees.

### *Benefits*

VUSD currently provides health benefits to 1,240 certificated, 803 classified and 256 management staff. Coverage includes medical, dental, vision, pharmaceutical, and counseling services. Grand Rounds is a new service that was added in the latter part of the health plan year. It is a program that offers a second opinion delivered remotely from world-leading experts specializing in the area of need; for those with a documented diagnosis from a doctor and would like an expert's second opinion; find themselves confronting a complex medical condition or would like to have their medications or treatment plan reviewed. Grand Rounds also offers in-person visits. It provides resources for those recently moved and looking for new doctors; have a need for a new type of specialist or want to make sure their treating physician is best suited for their exact medical needs.

The District holds an annual flu clinic for all "active" employees in the month of October. VUSD also sponsors District paid Hepatitis B vaccinations for all job categories listed within our Blood Borne Pathogens Exposure Control Plan.

### *Leaves*

All VUSD employees are provided with sick, personal, discretionary, and industrial leave through their respective collective bargaining agreement. Other leaves may also be granted based on state and federal guidelines. With the implementation of AB 1522, Healthy Workplace/Healthy Families Act, effective July 1, 2015 any employee with VUSD not in a "contracted" position, receives 3 days or 24 hours of paid sick leave.

### *Risk Management*

Over the last two years we have been working to improve the safety culture within VUSD. We have improved lighting at Mineral King, Royal Oaks, and Redwood High School. We have provided all custodial night crews (120+) with headlight bands to further reinforce our commitment to ensuring the safety for all. We have conducted weekly site visits to inspect and address any immediate safety concerns. The Chemical Hygiene Plan and the Blood Borne Pathogens Exposure Control Plan have been updated. A copy has been provided to each site/departments; copy can also be accessed via the VUSD website.

The District has also contracted with Keenan & Associates to provide District, federal and state mandated online trainings to all VUSD employees. Trainings assigned in the 2015-16 included: Mandated Reporter: Child Abuse and Neglect, Sexual Harassment: Staff-to-Staff, Diversity Awareness: Staff-to-Student, and Blood Borne Pathogens Exposure Prevention.

Additionally, Keenan & Associates provides loss prevention consulting and trains our maintenance division in proper use and inspection of fire extinguishers and forklift training. The consulting services also include indoor air quality inspections, site inspections, and ergonomic workspace evaluations to assist in reducing our workers' compensation liability.

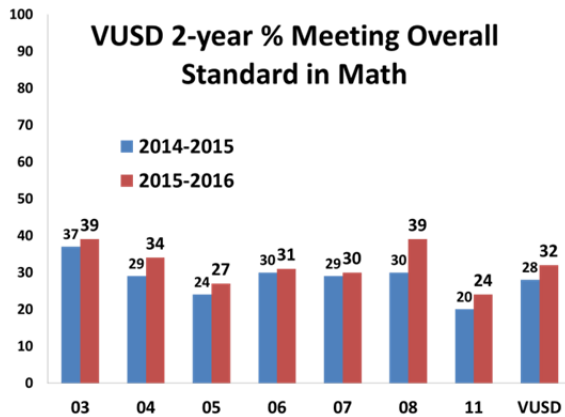
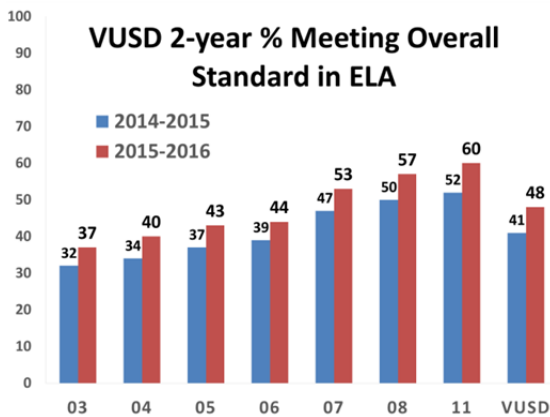
# Instructional Services

## Assessment

California has developed a comprehensive plan for high-quality teaching and learning in every school to prepare our students for the challenges of the future. Our work in Visalia Unified is well under way, with higher academic standards, more decision-making in the hands of schools and communities, and more resources dedicated to schools and to students.

Because the things we want students to know and be able to do have changed, our instruction, and tests, have changed as well. Visalia Unified is providing more support for teachers, more resources for students and more access to technology. As a result, exciting changes have begun to take place inside our classrooms. Along with reading to follow a story, students are learning to read to cite evidence and draw logical conclusions. They are learning to use math to solve real-world problems rather than merely pick out the right multiple-choice answer.

Each spring, students in grades three through eight and eleven take part in the statewide administration of the Smarter Balanced Assessments, which are part of an overall testing system called the California Assessment of Student Performance and Progress (CAASPP). The Smarter Balanced Assessments are computer-based tests that replace the former paper-based, multiple-choice assessments in English language arts/literacy and math. The tests are an academic check-up, designed to give teachers feedback they need to improve instruction and the tools to improve teaching and learning. The assessments use computer adaptive technology to provide more accurate information about individual student performance. Preliminary reports of student performance in Visalia Unified comparing the 2014-2015 with the 2015-2016 school years indicate that the percent of students meeting standard has increased at every grade level for both English Language Arts (ELA) and Mathematics:



## Curriculum

With student learning at the center of District efforts, teachers, support staff, and administration in VUSD continue to work at building shared knowledge about new academic standards and the 21<sup>st</sup> century skills required for all students to be both college and career ready. Implementation of new California state standards for mathematics and language arts represents an opportunity for rethinking instruction for all students. Through team collaboration and professional learning opportunities, staff have clarified their understanding of the academic content standards, as well as worked together to

implement instructional shifts designed to promote deeper levels of critical thinking, build the communication and collaboration skills of our students, promote creativity and innovative thinking, while also developing and promoting civic mindedness in our students.



During the 2015-16 school year there was renewed emphasis on literacy and language development, as well as classroom discourse, student engagement, problem-based learning, and the effective use of technology to enhance student learning. Teachers worked in collaborative teams at their individual schools and as leadership teams across schools, building both a challenging curriculum and instructional design needed to help students succeed in today's ever changing world.

Our new California standards set high expectations for all students. Armed with this knowledge, our District examined practices that support high levels of literacy and language development for every student and especially for our English Learners. Initial efforts in these areas guided summer professional development in 2016 and are central to sustained efforts to improve instruction at all grade levels and across all disciplines this year.

Interdisciplinary teams in our Linked Learning Academies worked collectively on PBL – Project Based Learning and shared their expertise across teams and through our Secondary Mini Conference. Teacher teams continue to work on inquiry, challenging tasks, and relevant real world applications.

Our work supports our District focus on building professional learning communities (PLC), with the PLC foundation in learning, results, and collaboration. Through professional development events during the school year, during the summer, and as the 2016-17 school year began, teachers and administrators have worked together to build collective understanding and hone their skills in working effectively as teams.

Teachers are currently engaged in opportunities to collaborate and extend their own understanding of the new standards with a focus on “how” students learn best and what strategies support learning. Professional development and support are important to establishing learning communities among teachers and administrators.

Visalia Unified will continue to promote a challenging, standards-based curriculum for all students ensuring adequate time for instruction and student learning. While ensuring that all students learn at high levels presents challenges, preparing every student with both the academic and thinking skills required of today's citizens is central to the mission of *Visalia Unified*.

### Career Technical Education and Linked Learning

Four more Linked Learning Academies were opened in 2015, bringing the total to six District-wide. The final 4 Academies will open in the fall of 2016 to complete the District implementation. See the table below for academy themes, year opened, and locations. Linked Learning is an educational approach which combines integrated academics, career themed courses, work-based learning, and students supports to create a true college and career ready environment. The District also started new

bus routes in the morning and afternoon to support academy students. By the fall of 2016 there will be over 1000 students enrolled in Linked Learning academies district-wide.

Academy/Year Opened	High School
Agricultural Bioscience and Technology/2015	VTEC
Architecture and Engineering/2015	Redwood High School
Business and Finance/2016	Golden West High School
Computer Science/2015	Mt Whitney High School
Engineering and Ag Manufacturing/2014	Golden West High School
First Responders/2016	Golden West High School
Health Sciences/2014	Mt Whitney High School
Law and Justice/2016	Redwood High School
Media Arts/2015	El Diamante High School
Sports Therapy Rehabilitation Orthopedics Neuromuscular Gains “STRONG”/2016	El Diamante High School

Visalia Unified continues to develop strong business partnerships through the Visalia Partners in Education (VPIE) committee. VPIE sponsors and supports work-based learning events across Visalia and directly supports Career Technical Education in VUSD. Last year, the community of Visalia and VPIE made over \$425,000 in monetary and in-kind donations to support Linked Learning Academies and CTE Pathways.

Career Technical Education programs in VUSD received the Career Technical Education (CTE) Incentive Grant from the Department of Education. This is \$1.7 million grant to enhance, expand, and improve CTE programs across the district. It will also help with much needed facility upgrades in CTE facilities.

## Health Services

Health Services had several new health related state laws implemented during the 2015-16 school year. One of these laws included the requirement for all students to be fully immunized, eliminating the previous personal beliefs immunization waiver. Although VUSD has not had a significant amount of immunization waivers, providing information to parents on this requirement has been addressed.

Another new requirement for school children was the addition of the near vision assessment; previously, only far vision screening had been performed; finding the appropriate screening tool and adding this assessment has proven very beneficial in identifying possible vision defects and allowing students to increase their learning potential. A total of 13,941 individualized vision and hearing assessments were completed by school nurses.



With a staff of 12 credentialed school nurses who provide the overall school health management, and 30 treatment nurses providing the hands on daily care to students, a total of over 111,084 students visited the health offices. Not included in this number are the routine medication administration tasks, and student specific daily care tasks that enable students to remain in school and access learning.



As an American Heart Association CPR and first aid training center, with VUSD nurses and trainers as in-house instructors, over 450 teaching staff and coaches were certified last year. AEDs for emergency response are checked monthly and available for emergency response on all campuses. The addition of full time athletic trainers at each of the comprehensive high schools has added additional health and safety support for student athletes; mandated concussion monitoring and follow-up has been strengthened by this addition. Community collaborative efforts include the continuing partnership with the UC Berkley FIT Study (adding 3 additional elementary schools this year), Healthy Visalia, Linked Learning, nursing mentorships with the Adult School and college nursing students, and daily nursing services for the Pro-Youth HEART and afterschool programs, as well as extracurricular activities.

## Special Education

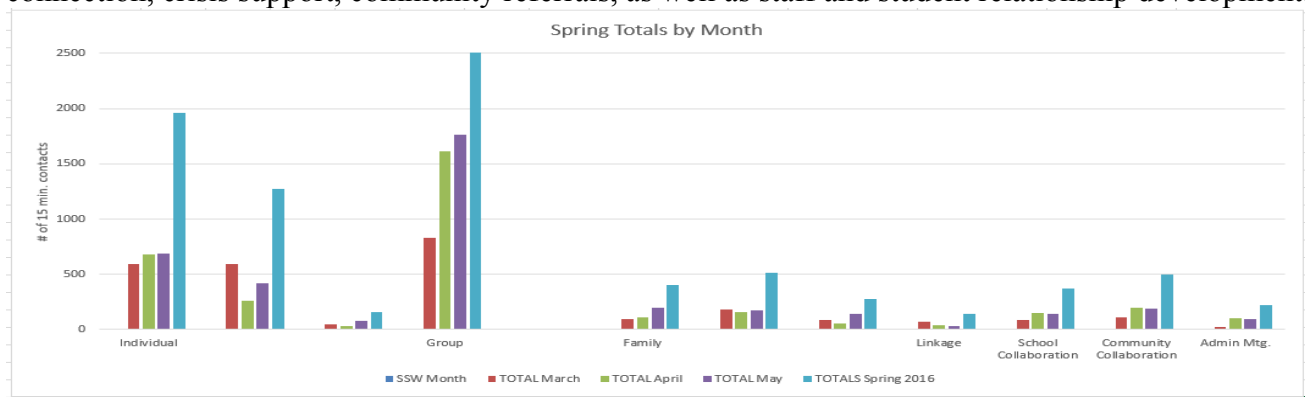
### *Consultative Behavior Support Program*

The Consultative Behavior Support (CBS) program of VUSD's Behavior Intervention Team provides assessment, consultation, and training through a District-based service delivery model. By doing so, CBS offers expert support and resources to assist staff in creating conditions for students' social, behavioral, and educational success. The number of students referred to CBS has increased every year since the program's inception:

- 2012-13 – 62 referrals
- 2013-14 - 77 referrals
- 2014-15 – 92 referrals
- 2015-16 – 127 referrals

While there was a consistent increase in referrals (20-24%) during the first three years of the program, an unprecedented number of students were referred to CBS during 2015-16 school year. The result of these referrals is that more teachers, aides, and administrators received specific, hands-on behavior training this year than any year prior.

In addition, the District hired five new School Social Workers during the 2015-16 school year. These new staff members provide a wealth of expertise in bridging home, community, and school environments to help address the overall needs of VUSD students. Between March 2016-May 2016 alone, School Social Workers made over 10,011 student contacts, providing counseling, parent-home connection, crisis support, community referrals, as well as staff and student relationship development.



### *Preschool Program*

The Preschool Special Education Team is continuously working to improve services and implement “best practice” for children with exceptional needs. We believe that all children with disabilities are important and benefit from targeted educational instruction. We nurture honest and supportive relationships with our preschool children and their families and are dedicated to being instrumental in helping our District to close the achievement gap for children with a disability.



Over the last few years we have been working to improve service delivery for our youngest students. A major commitment of VUSD was the establishment of the Early Learning Center (ELC) at Crestwood Elementary. The ELC houses the Preschool Assessment Team (PAT), Preschool Academic Learning Classes (PALC), and Parent Involvement Program (PIP). With the support of LCAP funding the ELC was able to open two additional preschool classrooms for the 2015-16 school year. By year's end the ELC provided early education opportunities to 53 students with disabilities and 37 typically developing students in a classroom environment. There were 182 Transition Planning meetings attended for children turning three between July 1, 2015 and June 30, 2016 and exiting early intervention services. Due to a suspected disability, the PAT completed 95 full assessments.

Additionally, during the 2015-16 fiscal year, First 5 Tulare County approved a grant request in the amount of \$180,000 to support the District's commitment to refurbish and expand the ELC. This project provides a single point of entry for the ELC, a preschool playground, a preschool restroom, and remodeling of current classrooms. As a result of the expansion, the ELC will also house the Collaborative Autism Partnership (CAP) preschool beginning in 2016-17. The CAP preschool provides a program for students with Autism, which uses applied behavioral analysis techniques to enhance functional and pre-academic skills, improve behavioral skills, and increase language development.

The ELC was also the recipient of the Lowes “Hero” project. Through this project Lowes generously donated \$2,500 in materials as well as their time to provide a playhouse, benches, fencing, and an updated watering system for the herb garden. The commitment of the District and the support from the community will allow the ELC the ability to provide preschool students with opportunities to learn and grow in the least restrictive environment.



## State and Federal Projects

State and Federal Projects is comprised of several programs and services: American Indian, Migrant, Parent University, District academic counseling services, and student attendance interventions. These programs work closely together to serve our students.

The twenty five elementary Student Advocacy and Family Engagement Technicians (SAFEs) work with families through Parent University programs, inform parents the importance of attendance, and connect students and families to outside agencies. Our SAFE's also work closely with the District's Migrant and American Indian programs to provide support academically, socially, and emotionally.

The Migrant program provides summer school for all migrant children. The program is hosted at an elementary site with a Science, Technology, Engineering, and Math (STEAM) focus. For those students who are unable to attend our site based summer program, we visit the students' homes several times during the summer to provide instruction. In addition to summer school, our Migrant Program provides home based instruction to over 25 preschool students and funds interventions for elementary students at the sites during the school year.

State and Federal Projects is responsible for the Student Attendance Review Team (SART) at elementary sites, and the District's Student Attendance Review Board (SARB). We have partnered with Parenting Network, CWS, and our county District Attorney's office. The role of SART/SARB is to ensure services are being accessed for students. Due to the combined effort of these agencies our number of students who are chronically absent has decreased.

Students and families receive additional support through the work of District counselors. The counselors work directly with 5<sup>th</sup> – 9<sup>th</sup> grade students to increase college/career readiness as well as offer a series of workshops to inform and empower parents through the college application process.

Services provided by State and Federal Projects extend to our homeless students as well. Our homeless liaison ensures homeless students are identified and served in accordance with the changes in legislation enacted by Every Student Succeeds Act (ESSA). Similar to the connections our SAFEs make to community services, our liaison coordinates services for homeless students and works closely with the student services division to coordinate for foster youth as well.

Along with providing service to students we also provide service to sites in the area of budgets and expenditure of funds. State and Federal Projects provides technical support to sites in the areas of School Site Councils, English Learner Advisory Committees, and Single Plans for Student Achievement. We are responsible for ensuring compliance in regards to expending state and federal categorical funds at the site and district level.

## Student Services

Student Services provides a diversity of services to our students, parents, schools, and communities that we serve in the District. The division is responsible for providing an interdepartmental approach to resolving identified student issues related to school attendance and transfers, student behavior, and student records. We work closely



with law enforcement agencies, Social Services, the courts, Juvenile Probation, and numerous community agencies that provide services to our students. Our staff works directly with students, parents, schools, and community members to provide and promote safe school environments for learning and limitless opportunities.

The highlight of the 2015-16 school year was the continued implementation of the Positive Behavior Interventions & Supports program (PBIS) at all grade levels and schools sites. PBIS is a proactive approach to establishing and implementing the behavioral supports and school culture needed for all students to achieve and experience social, emotional, and academic growth and success. School success is based upon meeting all criteria that address the reduction of school-wide behavioral incidents while improving academic achievement. We are proud to announce that one school site received Gold Level status and 14 school sites received Bronze Level status during the 2015-16 school year.



**P.A.W.S.**  
**Positive Attitude**  
**Academic Focus**  
**Wise Choices**  
**Show Respect**

During 2015-16, Student Services has continued to proactively address the various issues that our students and families may encounter which prevent students from fully achieving in and out of the classroom. The division has successfully increased the intervention and counseling programs offered at our various school sites through the additional resources, staffing, partnerships with intervention agencies, and our strong partnerships with the Visalia Police Department and Tulare County

Sheriffs Department. As a result, we continue to see significantly declining disciplinary incidents for the past five years. Disciplinary incidents that may lead to suspension have shown a 9% decline in the past school year, and a 52% decline since the 2011-12 school year.



# Unaudited Actuals

The Unaudited Actuals Report is the district's final budget report for the fiscal year until the Annual Financial Report or audit is presented in January. This report is a snapshot of District activity as of June 30, 2016.

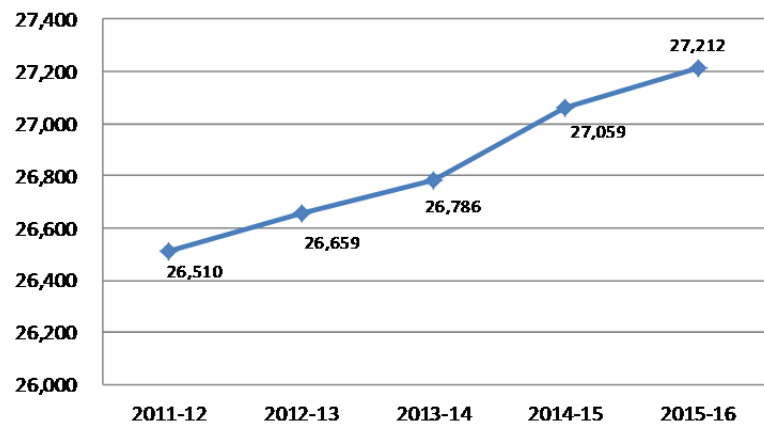
## 2015-16 Enrollment and ADA

In 2015-16, Visalia Unified School District enrollment increased by 153 students or 0.57%. The P-2 average daily attendance (ADA) increased 263.90 or 1.02% over prior year. The 7<sup>th</sup>-12<sup>th</sup> grade sites continue to improve attendance through Saturday School.

### Five Year and ADA History

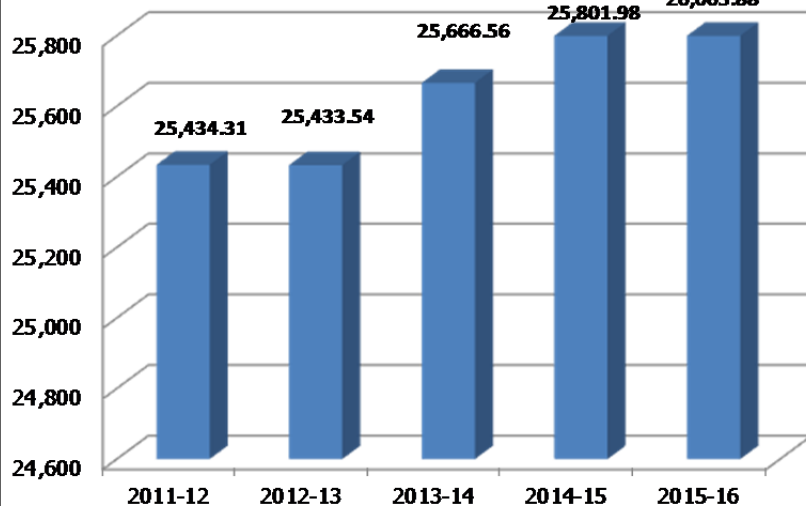
Fiscal Year	October CALPADS	Change
2011-12	26,510	
2012-13	26,659	0.56%
2013-14	26,786	0.48%
2014-15	27,059	1.02%
2015-16	27,212	0.57%
Excludes Charters		

#### Five Year Enrollment Comparison (CALPADS)



Fiscal Year	P-2 ADA	Change
2011-12	25,434.31	
2012-13	25,433.54	0.00%
2013-14	25,666.56	0.92%
2014-15	25,801.98	0.53%
2015-16	26,065.88	1.02%
Excludes County/ Charter ADA		

#### 5 Year Trend P-2 ADA



# Unrestricted General Fund (010)

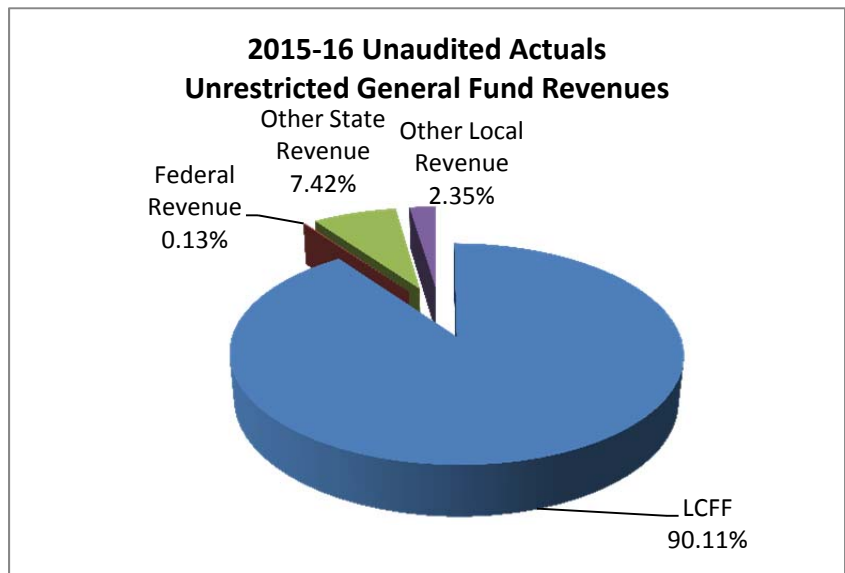
## Revenue

In the 2015-16 Unaudited Actual report, Visalia Unified School District's total unrestricted general fund revenues are reported at \$259,583,181 at year-end. This is \$5,825,388 more than was projected in the district's Second Interim report approved on March 8, 2016. The changes in each revenue category from Second Interim are:

- LCFF Sources increased by \$2,032,834 due to changes in ADA at our Period 2 attendance reporting.
- Federal revenues decreased by approximately \$324,705 for revenues carried over to FY17.
- Other State revenues increased by approximately \$244,234 due to increased lottery and mandated cost revenues.
- Local revenues increased by \$3,223,616 due increased interest earnings from Fair Market Value adjustments, redevelopment revenues and donations.

### Local Control Funding Formula (LCFF)

LCFF revenues totaled \$233,918,684 for the third year of the implementation of the new funding model and make up 90.11% of total unrestricted general fund revenues. Districts will receive 52.20% of the difference between fully implemented funding and 2014-15 funding levels. LCFF revenues are made up of local property taxes, Proposition 30 Education Protection Act receipts, and State Aid. Local property taxes make up \$35,404,545 of the total LCFF allocation, Prop 30 revenues make up \$37,558,593, and the remaining \$162,332,023 is State Aid. A \$1,376,477 reduction was applied to total LCFF revenues for prior year adjustments to revenue limit and in-lieu tax transfers to charter schools.



### Other State Revenue

Other state revenues in the unrestricted general fund totaled \$19,250,410 for the year ending June 30, 2016. This is a 187.26% increase from what was recorded in the unrestricted general fund in 2014-15. Changes from the prior year include over \$13 million from one-time mandated costs.

### Local Revenue

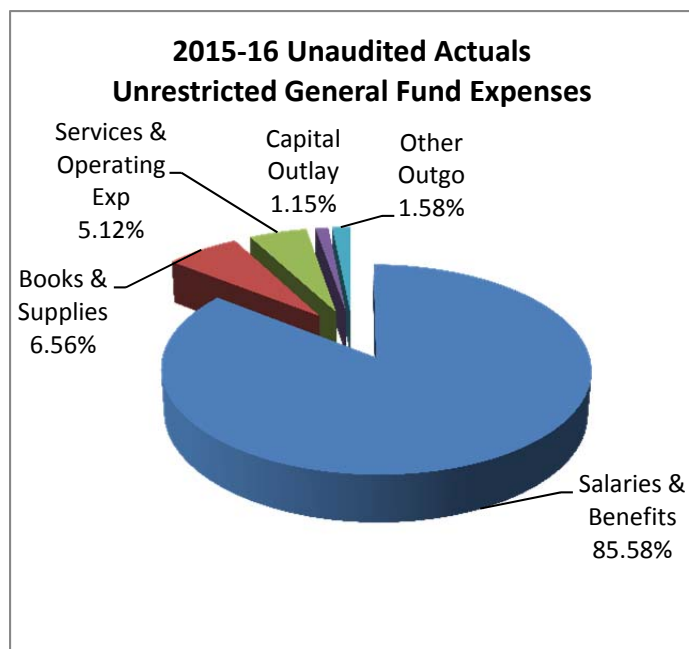
Local revenues totaled \$6,089,382 in 2015-16. This was an increase of 32.05% from the prior year. The increase is due primarily to the increase in Fair Market Value adjustments.

### Expenditures

Expenditures in the unrestricted general fund for the year ending June 30, 2016 totaled \$202,587,908. Unrestricted expenditures increased \$25,170,410 from the prior year. The increase is related to additional staffing costs for added personnel, negotiated salary increases and increased costs of benefits and retirement. In addition, with the increases in LCFF revenues, many programs and services associated with LCAP were restored or added for our students.

### Salaries and Benefits

Salaries and benefits, as a percentage of total general fund expenditures totaled 85.58% in 2015-16. Unrestricted general fund certificated salaries totaled \$99,701,180, an increase of 11.22% from the prior year. Classified salaries totaled \$26,169,552, up 16.99% from 2014-15. Employee benefits totaled \$47,509,661, a 15.97% increase over 2014-15. The increase is mostly attributed to additional staffing and negotiated salary and benefit increases.



### Books and Supplies, Services and Operating Expenses, and Capital Outlay

Unrestricted general fund books and supplies increased 25.36% from the prior year and totaled \$13,296,948 with most of that increase coming from the purchase of additional Chromebooks from one-time mandated cost funds. Services and operating expenses accounted for \$10,374,617 and included utilities (except electricity), insurance, consultants, repairs and travel. Expenses in this category showed an 11.20% increase from the prior year.

Capital Outlay in the unrestricted general fund totaled \$2,325,906. Capital outlay expenditures were for equipment, construction projects, and vehicles for various school sites and district departments.

### Other Outgo/Indirect Costs

Included in the Other Outgo category are debt payments and indirect costs. Expenses charged to this category totaled \$4,616,116.

Indirect costs, a negative expense or credit to the unrestricted general fund totaled -\$1,406,073. Indirect costs are charged to several restricted programs to offset unrestricted general fund administrative expenses that cannot be directly charged to those programs. Indirect charges cover expenses incurred by restricted programs for support services and activities such as utilities, technology, purchasing, payroll,

accounting, and human resources. The indirect charge is calculated as a percentage of total expenses, excluding capital outlay and other outgo. The indirect rate, which is re-calculated annually as part of the year-end closing process, was 4.73% for 2015-16. The calculation used for determining the rate can be found on Form ICR in the state supplemental forms section of this report.

## Other Financing Sources/Uses

The Other Financing Sources/Uses category consists of transfers in or out of the general fund, contributions to restricted resources, and capital lease revenues. In 2015-16, transfers out to other funds from the unrestricted portion of the general fund totaled \$26,615,164.

Contributions to restricted resources are also reported in the Other Financing Sources/Uses category. In 2015-16, \$25,191,233 was transferred out of the unrestricted general fund as contributions to restricted programs, including Special Education, Routine Maintenance, and Transportation.

Contributions were made to Transportation as required by the state in order for the district to maintain its current level of transportation apportionment funding. The contributions to the transportation accounts were offset by revenues received for transportation contracts with other districts.

## Fund Balance and Cash

Revenues minus expenditures plus other sources/uses results in a net increase of \$6,758,774 to the unrestricted general fund ending balance for the year ending June 30, 2016. This brings the unrestricted ending balance to \$53,517,822. The unrestricted general fund ending balance has been assigned for the purposes listed in the table below.

<b>Unrestricted General Fund Ending Fund Balance Components &amp; Reserves</b>	
13.5% Reserve for Economic Uncertainties*	\$ 40,161,612.00
Stores / Revolving Cash / Pre-paid expenses	\$ 1,036,250.87
Career Tech Carryover	\$ 780,996.00
Ridgeview Furnishings & Equipment	\$ 1,196,274.00
Charter School Ending Balances	\$ 1,382,461.00
Capital Projects Carryover	\$ 1,780,515.00
Campus Security Carryover	\$ 275,349.00
Reserve for LCAP	\$ 2,590,970.00
Carryover - Donations/Mandated Costs	\$ 354,210.00
New Elementary Equipment	\$ 750,000.00
Reserve for Textbook Adoption/Library	\$ 2,828,302.00
Unassigned/Unappropriated	\$ 380,881.92
<b>Total</b>	<b>\$ 53,517,821.79</b>

\*District Fund Balance Policy requires 15%



## Charter Schools

Expenses and revenues for Visalia Unified charter schools are reported within general fund unrestricted. Revenues are based on average daily attendance and other factors and come from the state under the Local Control Funding Formula (LCFF), just as District revenues. State and local funding for special education and lottery revenue for charter students are also reported in the general fund.

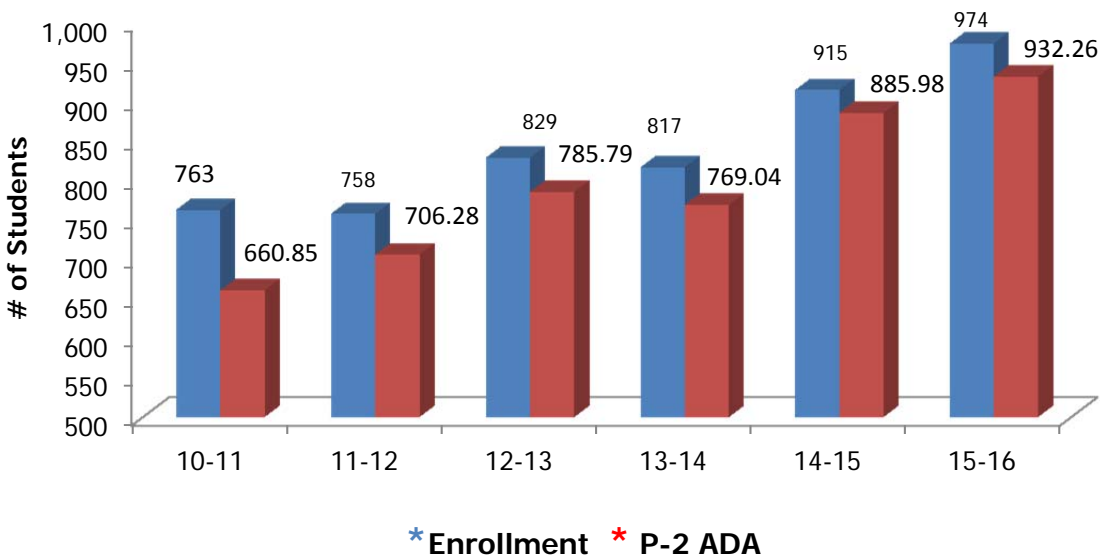
The District operated Charter Alternatives Academy, Charter Home School Academy, Visalia Charter Independent and Online School, and Visalia Technical Early College High School. Additionally, the District also sponsors Sycamore Valley Academy (SVA). SVA is responsible for reporting their financial information separately.

### ADA/Enrollment

In 2015-16, official CALPADS data shows a combined enrollment of 974 for the District's four charter schools. There was an increase of 6.45% in enrollment over prior year 2014-15 which was 915.

The funding for LCFF is based on charter school P-2 ADA and grade level base grants. Charter revenues totaled \$10,353,033 with expenditures totaling \$11,605,098.

### Charter Schools Enrollment & P-2 ADA



# Restricted General Fund (010)

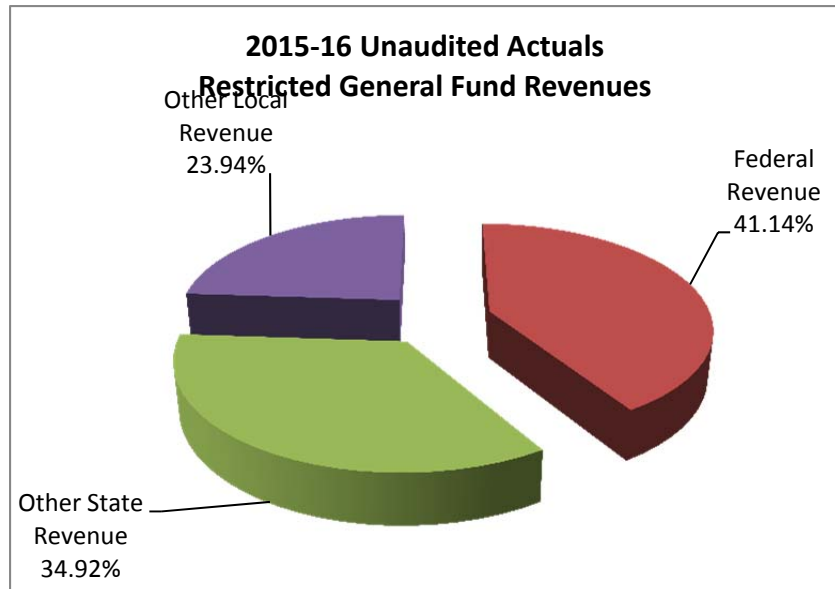
## Revenue

Revenues in the restricted general fund for 2015-16 total \$44,618,669. Revenues are comprised of \$18,356,785 in federal revenues; \$15,579,480 from state revenues; and \$10,682,403 in local revenue.

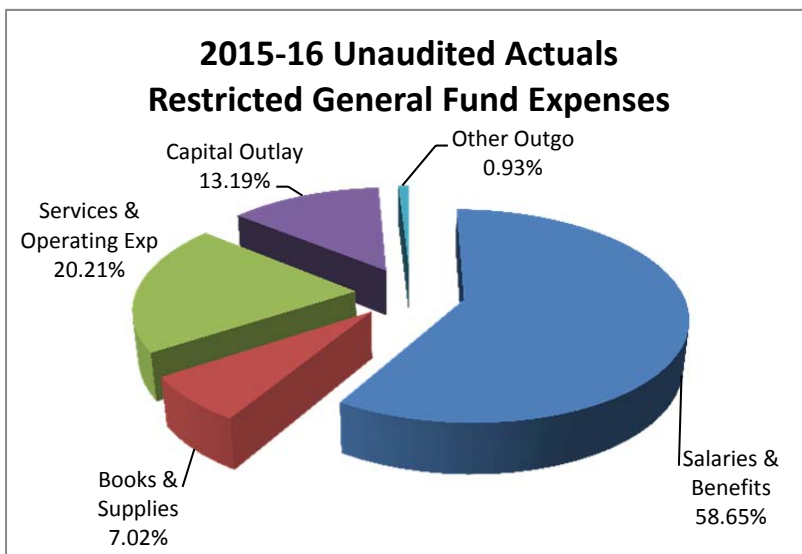
2015-16 federal revenues at year end totaled \$18,356,785, 0.18% more than the total reported in this category in 2014-15. Included in the federal revenues category are Title I, Title II, and other Title programs, Special Education federal local assistance funds and LEA Medi-Cal reimbursements.

The total amount received in the state revenues category for 2015-16 was \$15,579,480. This is a 80.95% increase from what was received in the prior year primarily from CTE incentive grants, Educator Effectiveness block Grant, and Prop 39 Clean Energy grants received in FY15-16.

Local revenues totaled \$10,682,403, which is 8.25% less than the prior year. Local revenues are received for pass-thru grants for Special Education, Preschool programs, and various local and private grants.



## Expenditures



Expenditures for the restricted general fund totaled \$68,109,548, which is approximately 9.86% more than what was spent in 2014-15. Increases in expenditures are primarily related to increases in Capital Outlay expenses as a result of increased grant funds and Maintenance projects.

Salaries and benefit costs in restricted programs totaled \$39,943,227. Books and supplies totaled \$4,784,244, a decrease of 34.40% over 2014-15

expenses in this category. The decrease is attributed to one time textbook and technology purchases for Common Core implementation during FY 2014-15. Costs in the services and operating expenses category totaled \$13,766,726, an increase of 3.32% from the prior year. \$8,983,541 is reported for capital outlay for purchases of equipment and construction projects, and increase of 89.76% related to state grants received for Proposition 39 Clean Energy as well as increased Maintenance and CTE projects.

Costs accounted for in the Other Outgo category totaled \$631,810 for indirect costs.

## Other Financing Sources/Uses

Both expenses and revenues are reported in this category. Transfers out totaled \$180,800.

In 2015-16, contributions in the amount of \$25,191,233 were transferred out of the unrestricted general fund as contributions to restricted programs, including Special Education, Routine Maintenance, and the Electric Utility resource.

## Fund Balance and Cash

The restricted general fund's ending balanced increased by \$1,519,554, ending the year at \$13,834,757. The ending balance in the restricted general fund is legally restricted and can only be used for the purposes intended by the funding agency.

<b>Components of Restricted General Fund Ending Balance</b>	
Medi-Cal	\$ 490,947.69
Lottery: Instructional Materials	\$ 1,160,272.09
Special Education	\$ 4,393,978.22
RRM	\$ 2,976,293.74
Other Restricted Local/Misc.	\$ 4,813,265.03
<b>Total</b>	<b>\$ 13,834,756.77</b>

## District Funds

### General Fund (Unrestricted and Restricted)

The General Fund is the chief operating fund of the district and is made up of both Unrestricted and Restricted funds. All transactions except those required or permitted by law to be reported in another fund are accounted for in this fund.

Unrestricted General Fund consists of revenues to run the basic educational program, offset by the cost of the basic program. Restricted General Fund consists of revenue received for specific and limited purposes, offset by the cost of those specific programs. In some cases revenue not spent on a restricted program must be returned to the funding source. In other cases, unspent restricted funds are carried forward to the following year to be spent for the same specific purpose. Restricted projects or activities within the general fund must be identified and reported separately from unrestricted projects or activities.

General Fund financial information, separated into both unrestricted and restricted categories for the year ending June 30, 2016 can be found in the Summaries and Reports section in the final section of this report and on the SACS forms available on the Districts website. Total combined revenues and other sources were \$304,201,850. Total General Fund expenses and other uses for 2015-16 were \$270,697,456. The ending balance for the combined general fund on June 30, 2016 was \$67,352,579, of which \$66,317,697 was restricted, reserved for economic uncertainty or reserved for cash, stores, and pre-paid expenses. The remaining \$380,882 was assigned as the unrestricted carry-over balances and other reserves.

Combined General Fund Revenues			
Revenue	2014-15 Unaudited Actuals	2015-16 Adopted Budget	2015-16 Unaudited Actuals
LCFF	\$ 202,378,996.18	\$ 231,434,482.00	\$ 233,918,684.12
Federal	18,323,840.89	18,774,671.00	18,681,489.95
Other State	15,311,087.77	23,636,246.00	34,829,890.34
Local	16,254,755.85	9,575,657.00	16,771,785.57
<b>Total Revenues</b>	<b>\$ 252,268,680.69</b>	<b>\$ 283,421,056.00</b>	<b>\$304,201,849.98</b>



<b>Combined General Fund Expenditures</b>			
<b>Expenditures</b>	<b>2014-15 Unaudited Actuals</b>	<b>2015-16 Adopted Budget</b>	<b>2015-16 Unaudited Actuals</b>
Certificated Salaries	\$ 103,284,370.35	\$ 115,404,216.00	\$ 114,430,593.66
Classified Salaries	31,007,189.99	37,732,830.00	35,327,890.20
Employee Benefits	54,725,268.59	57,796,876.00	63,565,137.01
Books/Supplies	17,899,979.91	18,173,398.00	18,081,191.94
Services/Operating Expenses	22,653,674.10	22,583,410.00	24,141,343.54
Capital Outlay	7,670,927.68	6,415,592.00	11,309,446.69
Other Outgo/Indirect Costs	2,173,454.76	1,936,741.00	3,841,852.66
<b>Total Expenditures</b>	<b>\$ 239,414,865.38</b>	<b>\$ 260,043,063.00</b>	<b>\$270,697,455.70</b>

## Special Revenue Funds

Special revenue funds are used to account for the proceeds from specific revenue sources that are restricted to the financing of particular activities.

### Adult Education Fund 110

The Adult Education Fund is used to account separately for federal, state, and local revenues for the adult education program. State revenues for adult education programs fell under the flexibility provisions enacted with the 2008-09 state budget, the revenue related to these programs is received in the district's general fund. Adult education expenses for 2015-16 were \$5,574,140 and revenues were \$7,452,219. The ending fund balance as of June 30, 2016 was \$4,347,335.

### Child Development Fund 121

The Child Development Fund is used to account separately for many of the federal, state, and local revenues to operate child development programs. Visalia Unified School District reports revenues and expenditures related to the State Preschool program and a reserve account in Fund 121. In 2015-16, Fund 121 expenses totaled \$1,677,839 and revenues were \$1,864,100. The ending fund balance in Fund 121 as of June 30, 2016 was \$251,998.

### Cafeteria Fund 130

The Cafeteria Fund 130 is used to account for federal, state, and local revenues to operate the nutrition services program which provides meals and snacks to district students. Visalia Unified School District participates in the National School Lunch Program (NSLP) and as such, receives reimbursements for meals served to eligible needy students from both state and federal sources. In addition, fees are collected for meals from students whose families do not qualify for free or reduced meals. Total revenue recorded in Fund 130 for 2015-16 was \$11,035,410 and expenses amounted to \$12,710,779. The ending balance in Fund 130 as of June 30, 2016 was \$3,065,753.

### Special Reserve for Other Post-Employment Benefits Fund 200

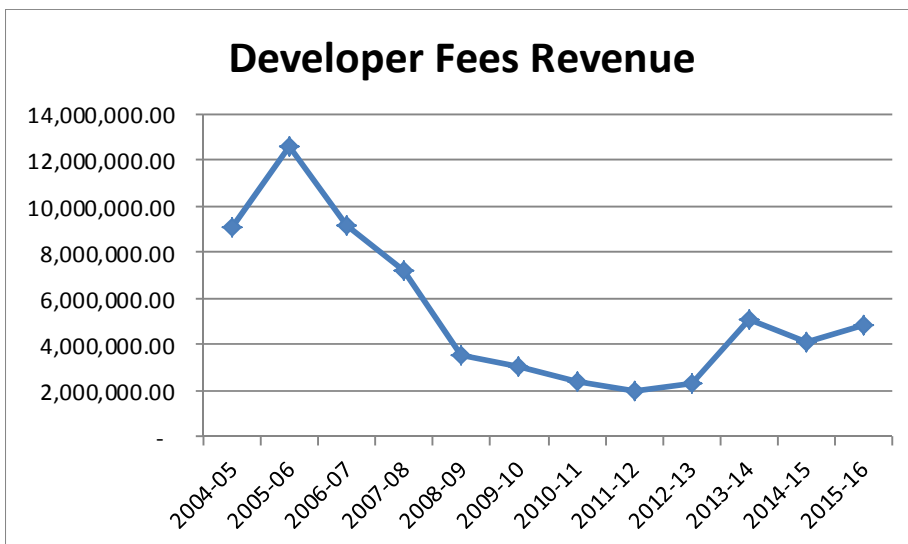
The Special Reserve for Other Post-Employment Benefits Fund 200 is used to account for amounts the district has earmarked for the future cost of postemployment benefits but has not contributed irrevocably to a separate trust for its postemployment benefit plan. A total of \$1,861,555 is reported as a transfer into Fund 200 and \$13,935,558 was the ending balance on June 30, 2016.

### Capital Project Funds

Capital Project funds are used to account for revenues and expenditures related to the acquisition and/or construction of all major governmental fixed assets. The district maintains four capital projects funds.

### Building Fund 210

Building Fund 210 is used to account separately for proceeds from the sale of Visalia Unified's voter approved bonds and expenditures from this fund are most commonly made for capital outlay. In November 2012, voters approved Measure E to fund facility improvements at all of our school sites over 10 years old and to build a new middle school. With the approval of Measure E, \$60.1 million was approved. Total revenue recorded in Fund 210 for 2015-16 was \$259,531 and expenses amounted to \$32,028,388. The ending balance in Fund 210 as of June 30, 2016 was \$5,075,838.



### Capital Facilities Fund 250

Capital Facilities Fund 250 is used to account separately for monies received from developers. Fees are received from individual homeowners building or remodeling single family dwellings and from large scale developers, often in the form of Community Facilities District bonds (CFDs) and interest. Developer fee revenues in this fund have dropped dramatically from their

peak in 2005-06 when fees collected reached \$12,546,321. Fee collections reached a low in 2011-12 when just \$1,987,721 in fees were recorded. For 2015-16, developer fees payments totaled \$4,818,416, a 17.90% increase from the amount received in the prior year. Total revenue in Fund 250 for the 2015-16 year was \$4,818,416 and expenses totaled \$5,022,742. The fund ended the year with a balance of \$5,215,666.



### State School Facilities Fund 350

State School Facilities Fund 350 is used to receive apportionments from the State School Facilities Fund for new school facility construction, modernization projects, and facility hardship grants. Typical expenditures from this fund are for site acquisition, site improvements, buildings, furniture, and fixtures that will be capitalized

as part of a construction project. There was a \$201,742 ending balance in Fund 350 as of June 30, 2016.

#### Special Reserve for Capital Outlay Fund 400

Special Reserve for Capital Outlay Fund 400 is used primarily to account for the accumulation of resources for capital outlay purposes. Principal revenues in this fund are derived from rental and lease income, interest, transfers in from other funds, and proceeds from the sale or lease-purchase of land and buildings. Expenditures totaled \$9,080,097. Revenues totaled \$963,918. The ending balance in Fund 400 as of June 30, 2016 was \$34,204,836.

### Debt Service Funds

Debt service funds are established to account for the accumulation of resources for the repayment of long term debt. The district maintains two debt service funds.

#### Bond Interest and Redemption Fund 511

The Bond Interest and Redemption Fund 511 is used to account for the collection of tax receipts, premium payments, and accrued interest from the sale of bonds. This fund was established after the passage of Measure G in 1998. In 2010, these bonds were refinanced at a lower interest rate resulting in interest savings.

#### Bond Interest and Redemption Fund 514

This fund was established after the passage of Measure E in 2012.

All transactions within fund 511 and 514 are managed solely by the Tulare County Office of Education and the Assessor's Office. Revenues in these funds are comprised of ad valorem taxes paid by property owners within the VUSD boundaries.

In 2015-16, Fund 511, 514, and 516 expenses totaled \$4,887,357 and revenues were \$3,262,663. The ending fund balance in these funds as of June 30, 2016 was \$7,162,369.

#### Certificates of Participation Fund 561

Fund 561 was established to account for the Certificates of Participation originally issued in 1996 and refinanced in 2005. Revenues for this fund come from Redevelopment revenues as well as transfers from the General Fund.

### Proprietary Funds

The district maintains one proprietary fund to account for transactions in its self-insurance accounts.

#### Self Insurance Fund 670

The Self Insurance Fund 670 is used to separate monies received for self-insurance activities from the districts other operating funds. Revenues come from employee payroll deductions and district contributions toward employee health insurance and worker's compensation costs. During the 2015-16 year, \$40,535,175 in revenues from payroll contributions and interest earnings were recorded for both active and retired members. \$36,013,061 in expenditures for claims, premium payments, and other related costs were also recorded. The ending balance in Fund 670 as of June 30, 2016 was \$24,584,055.