Whittier Union High School District

Case Summary

The Whittier Union High School District (WUHSD) straddles three southern California cities including Whittier, Santa Fe Springs, and North Norwalk and serves 23,400 mostly Latino students. Nearly 100 percent of its seniors successfully pass the California High School Exit Exam. The district has a 93 percent graduation rate, and 95 percent of its students attend college or a trade school after graduation. It has maintained strong fiscal health during the Great Recession despite declines in student enrollment and state funding. In the fall of 2008, the district succeeded in passing “Measure W” that continued facilities upgrades started by a previous measure. The bond associated with “Measure W” earned a high credit quality rating of AA. WUHSD is a case of how community–wide trust plays a crucial role in supporting inclusive processes for financial decision making that support the core educational mission of the district.

A 50–member Budget Review Committee (BRC), which includes representatives from the unions, faculty, and staff, meets quarterly to discuss and review budget cost savings and efficiencies. Having the BRC in place has enhanced the financial literacy of its members and, through their public meetings, the BRC has educated the community. As a result, there is a general feeling among the district’s residents that WUHSD has created a sense of trust, communication, and partnerships and has effectively and efficiently used public funds. It has successfully used budgeting and financial scenario development in making fiscal decisions, leveraging projected enrollment information from its feeder elementary and middle schools.

The school district issues annual reports to the community and posted reports on the district website that includes easy–to–understand charts and narratives about the district’s financial condition and updates about bond measure initiatives. The management team provides a weekly report to keep board members informed of financial and other big issues. Community members are tapped to serve on oversight committees on facilities bond measures.

An unusual feature of the WUHSD’s fiscal decision–making process is its problem–solving partnership with its employee unions. Representatives from the unions are members of the BRC and are well aware of how differently other school districts treat budget and other fiscal information. A union member noted,

“the superintendent…was very candid about these things (where the budget was and would likely go, what the forecasts were and what the budget assumptions were…It was a deliberate effort to educate, explain why and lay everything on the table. I hear that in other school districts, they are not quite as open about all of those things.”
Community engagement and communication is seen as a reciprocal relationship within WUHSD with school district leaders attending community meetings and serving on community boards, and community members similarly involved with the district. School district playing fields are shared with city youth groups, and the district leverages its students’ high school experiences through its partnership with area community colleges. Both the district and its surrounding communities recognize the economic benefits that have resulted from having more businesses and residents wanting to stay in its schools, as well as others wanting to move into the district in order to attend high-quality high schools.

**Connections to the Financial Sustainability Framework**

**LS #1 – Create open communication among all participants.** The district management team keeps the community informed about financial conditions of the district through various channels: annual reports to the public, weekly reports to the board, the BRC, oversight committees, and other community forums.

**LS #2 – Help stakeholders to build trustworthy reputations.** The superintendent took the lead in communicating with and engaging the community, and over–time built community–wide trust in the integrity and quality of the school district.

**LS #3 – Convince stakeholders there can be benefits from collective efforts.** By developing credible and easy–to–understand financial analyses and making them available to the public, the district was able to convince the community to pass facilities improvement bonds even during economic hard times. Such openness about the district’s financial condition, together with good and constructive relationships with the two employee unions, helped the management team to successfully convince the unions to cooperate in building up substantial reserves to protect the district from the economic downturn during the Great Recession.

**LS #5 – Build long–term horizons into fiscal planning.** The district management team worked with feeder schools to anticipate the extent of decline in student enrollment. The team also worked with employee unions to build substantial reserves in anticipation of economic downturns.

**IDP #1 – Well–defined boundaries.** The district has developed inclusive processes, committees, public meetings, and communications channels that reach out to different corners of the community.

**IDP #3 – Collective choice arrangements.** The BRC, various oversight committees, and frequent interactions between the board and the management team help ensure the integrity and credibility of financial decision making in the district.
**IDP #4 – Monitoring and decision making.** Community trust in the district is built on open sharing of easy-to-understand financial information and the extensive involvement of community members in review and oversight committees.

**IDP #7 – Minimum recognition of rights.** The management team worked closely with the boards, employee unions, feeder schools, and community organizations to build up reserves in anticipation of declining state funding and student enrollment.

**IDP #8 – Networked enterprises.** The district partners with other schools, local governments, businesses, and nonprofits to save money.

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