

HIGH QUALITY INSTRUCTION
Class Size Reduction, Support for Teaching and Learning
BSEP Measure E1, Resource 0741
BSEP Measure A, Resource 0841

ANNUAL REPORT: FY 2018-19
UPDATE: FY 2019-20

Measure E1 Purpose

...reducing class sizes at all District-operated K-12 schools, and may also be allocated to provide funding for professional development, classroom support, program evaluation, and expanded course offerings.¹

Budget Managers: Pasquale Scuderi, Associate Superintendent for Educational Services
Donald Evans, Superintendent
Reported By: Bajé Thiara, Associate Superintendent for Educational Services
Brent Stephens, Superintendent

BACKGROUND INFORMATION

Beginning in 2017-18, BSEP Measure E1 funds are provided to balance class sizes at all District-operated elementary schools. Under the prior BSEP measures, elementary class size averages were calculated district-wide, allowing for significant variation among schools, and the K-3 and 4-5 class averages had different goals of 20:1 and 26:1. Through E1, the average class sizes are being gradually adjusted, with the aim of achieving school-wide K-5 averages of 23:1. This exceeds the State class-size reduction goal of 24:1 for K-3 both in class size and grade span. The BSEP class size goals for grades 6-12 remain district-wide averages of 28:1, and are further reduced to 18:1 for the continuation high school.

The contribution of BSEP Class Size Reduction (CSR) Funds for classroom teachers is estimated using a planning tool known as the “Teacher Template.” The Teacher Template calculates student enrollment and staffing for class size ratios to be paid for by General Fund (GF) resources, and then calculates additional class size reduction costs to be paid for by BSEP funds. This calculation is based on the average actual cost of classroom teachers and release time, along with the average costs of substitute teachers, and a “direct support” calculation that provides for the costs of the additional classrooms that must be maintained to achieve lower class sizes. This contribution to the General Fund by BSEP is known as the “Teacher Transfer.”

After Class Size Reduction targets are met through the Teacher Template calculation, the Measure allows for discretionary expenditures in support of teaching and learning, including such purposes as professional development, classroom support, program evaluation, and expanded course offerings. These expenditures are directly charged to the Measure.

¹ BSEP Measure E1 Section 3.A

Below is the Revenue and Expenditure summary report for 2018-19 for expenditure of BSEP funds towards Class Size Reduction and additional purposes included in this resource.

2018-19 CLASS SIZE REDUCTION FUND – REVENUE AND EXPENDITURES

Class size goals were met through this resource, as detailed in the Class Size Reduction report to the Board of Education, October 23, 2019. To meet the class size goals, funding for a total of 135.43 FTE was provided through the transfer of funds from this resource to the General Fund.

See Class Size Reduction (Measure E1, Resource 0741) Revenue and Expenditures Comparison Report FY 2018/19 for further detail.

RESOURCE SUMMARY

For 2018-19, expenditures from Measure E1 funds were somewhat lower than initially budgeted, with savings going to the Fund Balance. At the time of planning for Measure E1, it was projected that a significant fund balance would be necessary in the first years of the measure in order to adequately address rising costs.

| Program | Budget | Actual |
|---------------------------|---------------|---------------|
| Professional Development | \$1,408,280 | \$1,234,389 |
| Program Evaluation | \$548,252 | \$499,990 |
| Expanded Course Offerings | \$825,950 | \$746,144 |
| Classroom Support | \$224,811 | \$224,671 |

STATUS REPORT

[Professional Development](#) and [Program Evaluation](#) programs are described in more detail in appendices.

Expanded Course Offerings: 7.6 FTE were approved for teachers to provide before and after-school classes in the middle schools and at Berkeley High school. The actual expenditures were less in a few cases where positions were open or there were changes in staffing during the 18-19 year.

Classroom Support: As planned, in 18-19 this resource provided 2.0 FTE at Berkeley High School for the Universal 9th Grade, and 0.6 FTE for support for Two Way Immersion (TWI) at Sylvia Mendez Elementary School.

Measure A Carryover

At the sunset of BSEP Measure A, fund balances remained in some Resources which may be expended only in accordance with the terms of the Measure. Funds were expended from Resource 0855 for Professional Development during the year.

Update FY 2019-20

Increased costs and transfers to General Fund: At the direction of the Board of Education, for 2019-20, the need for reduction of expenses in the General Fund lead to additional support from BSEP for the Universal Ninth grade (U9) at Berkeley High School. Whereas the FY18-19 Classroom Support budget from this resource included 2.0 FTE for U9, for FY19-20, another 3 FTE were added to the BSEP budget, for a total of 5 FTE supported through this BSEP resource. Furthermore, the “Direct Support” line item in the Teacher Template was recalculated to reflect current BUSD costs, which also increased the BSEP contribution to the General Fund.

Fund Balance: Even with this BSEP resource taking on additional expenses, the fund balance in this resource has continued to grow, with increased revenues coming at a time of lower FTE-associated costs via the Teacher Template during class size adjustments. This pattern was seen in the early years of Measure A of 2006 as well, but as enrollment, employee costs and program costs rose, that fund balance decreased sharply. Currently, plans for FY20-21 for this resource are likely to include additional program-related costs that will reduce the fund balance significantly.

Measure A: In FY 19-20, carryover funds from Measure A are being used to cover the costs of a Career Technical Education (CTE) Program Supervisor, 2.0 FTE in high school counseling staffing, and the cost of a Dean of Attendance on a one-time basis to defer the elimination of those services until alternative funding sources can be identified.

BERKELEY UNIFIED SCHOOL DISTRICT
BERKELEY SCHOOLS EXCELLENCE PROGRAM (BSEP)
HIGH QUALITY INSTRUCTION (Measure E1, Resource 0741)
Revenue and Expenditures
Comparison Report FY 2018/19

Purpose

Sixty-six percent (66%) of the available Revenues *shall be dedicated annually to reducing class sizes at all District-operated K-12 schools, and may also be allocated to provide funding for professional development, classroom support, program evaluation, and expanded course offerings.*

Budget Managers: Donald Evans, Superintendent

Pasquale Scuderi, Associate Superintendent for Educational Services

| | Adopted Budget 2018/19 As of 7/1/18 | 2nd Interim Budget 2018/19 As of 1/31/19 | Unaudited Actuals 2018/19 As of 6/30/19 | 2nd Interim Budget vs. Unaudited Actuals 2018/19 |
|---|--|---|--|---|
| REVENUE | | | | |
| Revenue | 19,601,204 | 19,792,861 | 19,895,770 | 102,909 (1) |
| BSEP Contribution to General Fund | (13,540,200) | (13,540,200) | (13,738,539) | (198,339) (2) |
| BSEP Direct Support | (383,000) | (383,000) | (388,695) | (5,695) (3) |
| BSEP Substitute Compensation | (250,700) | (250,700) | (254,345) | (3,645) (2) |
| NET REVENUE | 5,427,304 | 5,618,961 | 5,514,191 | (104,770) |
| EXPENDITURES | | | | |
| Professional Development | 1,351,500 | 1,408,280 | 1,234,389 | (173,891) (4) |
| Program Evaluation | 555,072 | 548,252 | 499,990 | (48,262) (5) |
| Expanded Course Offerings | 851,890 | 825,950 | 746,144 | (79,806) (6) |
| Classroom Support | 259,719 | 224,811 | 224,671 | (140) |
| Unallocated Reserve | 6,200 | 17,088 | 0 | (17,088) |
| Indirect Costs | 1,019,858 | 1,019,858 | 1,012,712 | (7,146) |
| TOTAL EXPENDITURES | 4,044,239 | 4,044,239 | 3,717,906 | (326,333) |
| NET INCREASE (DECREASE) | 1,383,065 | 1,574,722 | 1,796,285 | 221,563 |
| FUND BALANCE ANALYSIS | | | | |
| Beginning Fund Balance | 1,631,426 | 1,631,426 | 1,631,426 | 0 |
| Net Increase (Decrease) in Fund Balance | 1,383,065 | 1,574,722 | 1,796,285 | 221,563 |
| Ending Fund Balance | 3,014,491 | 3,206,148 | 3,427,711 | 221,563 |

Notes

- (1) Increase due to receipt of prior year and additional current year revenue in 2018-19
- (2) The BSEP Contribution to the General Fund includes only Class Size Reduction classroom teachers for regular and Special Education and substitutes for those teachers. In 2016-17, it funded 139.3 FTE, in 2017-18, it funded 130.42 FTE, and in 2018-19, it funded 135.43 FTE.
- (3) Operational and other costs associated with opening and maintaining additional classrooms.
- (4) Savings from teacher hourly, teacher stipends and monthly staffing cost and unspent TIP funds
- (5) Savings from open position due to change in staff assignment, hourly work and materials and supplies
- (6) Reduced costs due to open positions and changes in staffing

BERKELEY UNIFIED SCHOOL DISTRICT
BERKELEY SCHOOLS EXCELLENCE PROGRAM (BSEP)
CLASS SIZE REDUCTION (Measure E1, Resource 0741)
Revenue and Expenditures
Comparison Report FY 2018/19

Purpose

Sixty-six percent (66%) of the available Revenues *shall be dedicated annually to reducing class sizes at all District-operated K-12 schools, and may also be allocated to provide funding for professional development, classroom support, program evaluation, and expanded course offerings.*

Budget Managers: Donald Evans, Superintendent

Pasquale Scuderi, Associate Superintendent for Educational Services

| | Adopted Budget 2018/19 As of 7/1/18 | 2nd Interim Budget 2018/19 As of 1/31/19 | Unaudited Actuals 2018/19 As of 6/30/19 | 2nd Interim Budget vs. Unaudited Actuals 2018/19 |
|---|--|---|--|---|
| REVENUE | | | | |
| Revenue | 19,601,204 | 19,792,861 | 19,895,770 | 102,909 (1) |
| BSEP Contribution to General Fund | (13,540,200) | (13,540,200) | (13,738,539) | (198,339) (2) |
| BSEP Direct Support | (383,000) | (383,000) | (388,695) | (5,695) (3) |
| BSEP Substitute Compensation | (250,700) | (250,700) | (254,345) | (3,645) (2) |
| NET REVENUE | 5,427,304 | 5,618,961 | 5,514,191 | (104,770) |
| EXPENDITURES | | | | |
| Certificated Salaries | 2,088,662 | 2,137,083 | 1,935,289 | (201,794) |
| Classified Salaries | 101,746 | 105,945 | 106,704 | 759 |
| Employee Benefits | 657,846 | 646,565 | 575,293 | (71,272) |
| Materials, Supplies and Equipment | 10,000 | 10,000 | 86 | (9,914) |
| Unallocated Reserve | 62,127 | 17,088 | 0 | (17,088) |
| Contracts | 104,000 | 107,700 | 87,823 | (19,877) |
| Indirect Costs | 1,019,858 | 1,019,858 | 1,012,712 | (7,146) |
| TOTAL EXPENDITURES | 4,044,239 | 4,044,239 | 3,717,907 | (326,332) |
| NET INCREASE (DECREASE) | 1,383,065 | 1,574,722 | 1,796,284 | 221,562 |
| FUND BALANCE ANALYSIS | | | | |
| Beginning Fund Balance | 1,631,426 | 1,631,426 | 1,631,426 | 0 |
| Net Increase (Decrease) in Fund Balance | 1,383,065 | 1,574,722 | 1,796,284 | 221,562 |
| Ending Fund Balance | 3,014,491 | 3,206,148 | 3,427,710 | 221,562 |

Notes

- (1) Increase due to receipt of prior year and additional current year revenue in 2018-19
- (2) The BSEP Contribution to the General Fund includes only Class Size Reduction classroom teachers for regular and Special Education and substitutes for those teachers. In 2016-17, it funded 139.3 FTE, in 2017-18, it funded 130.42 FTE, and in 2018-19, it funded 135.43 FTE.
- (3) Operational and other costs associated with opening and maintaining additional classrooms.

**BERKELEY UNIFIED SCHOOL DISTRICT
BERKELEY SCHOOLS EXCELLENCE PROGRAM (BSEP)
CLASS SIZE REDUCTION (Measure A, Resource 0841)**

**Revenue and Expenditures
Comparison Report FY 2018/19**

Purpose

Sixty-six percent (66%) of the available revenues of this measure *shall be dedicated annually to reducing class sizes at all K-12 schools, expanding course offerings at all secondary schools and providing counseling services at each of the District's middle schools.*

Budget Managers: Donald Evans, Superintendent

Pasquale Scuderi, Associate Superintendent for Educational Services

| | Audited Actuals 2017/18 As of 6/30/18 | Adopted Budget 2018/19 As of 7/1/18 | 2nd Interim Budget 2018/19 As of 1/31/19 | Unaudited Actuals 2018/19 As of 6/30/19 | 2nd Interim Budget vs. Unaudited Actuals 2018/19 |
|--|--|--|---|--|---|
| REVENUE | | | | | |
| Revenue | 99,661 | 0 | 0 | 0 | 0 |
| Contribution (To)/From Measure A Reserve | 442,816 | 0 | 0 | (12,936) | (12,936) (1) |
| BSEP Contribution to General Fund (1) | 0 | 0 | 0 | | 0 |
| BSEP Direct Support (2) | 0 | 0 | 0 | | 0 |
| BSEP Substitute Compensation (1) | 0 | 0 | 0 | | 0 |
| NET REVENUE | 542,478 | 0 | 0 | (12,936) | (12,936) |
| EXPENDITURES | | | | | |
| Certificated Monthly Salaries (3) | 0 | 0 | 0 | 0 | 0 |
| Certificated Counselors Salaries (3) | 0 | 0 | 0 | 0 | 0 |
| Employee Benefits (3) | (1,005) | 0 | 0 | 0 | 0 |
| Unallocated Reserve | 0 | 0 | 0 | 0 | 0 |
| Indirect Costs | 0 | 0 | 0 | 0 | 0 |
| TOTAL EXPENDITURES | (1,005) | 0 | 0 | 0 | 0 |
| NET INCREASE (DECREASE) | 543,483 | 0 | 0 | (12,936) | (12,936) |
| FUND BALANCE ANALYSIS | | | | | |
| Beginning Fund Balance | 173,964 | 717,447 | 717,447 | 717,447 | 0 |
| Net Increase (Decrease) in Fund Balance | 543,483 | 0 | 0 | (12,936) | (12,936) |
| Ending Fund Balance | 717,447 | 717,447 | 717,447 | 704,511 | (12,936) |

Notes

(1) Contribution to the Measure A reserve Resource transferred at closing

PROFESSIONAL DEVELOPMENT

BSEP Measure E1, Resource 0741-000/019

BSEP Measure A, Resource 0855

ANNUAL REPORT: FY 2018-19

UPDATE: FY 2019-20

Measure E1 Purpose

After the District meets the Average Class Size goals as described in 3.A.i., funding may be allocated to provide additional support for teaching and learning, such as professional development, classroom support, program evaluation, and expanded course offerings.¹

Budget Manager: Pasquale Scuderi, Associate Superintendent for Educational Services,
Susanne Reed, Coordinator of Professional Development

Salaries

Budget: \$1,071,468

Actual: \$953,984

Variance: (\$117,484)

- Coordinator of Professional Development 1.00 FTE
- Teachers on Special Assignment (TSAs):
 - 11 Elementary Literacy Coaches 2.75 FTE
 - Elementary Literacy Lead Coach 0.60 FTE²
 - BHS Professional Development Leaders 4.40 FTE
 - BHS Instructional Technology TSA 1.00 FTE
 - District TSA for Instructional Technology 0.50 FTE²

Employee Benefits

Budget: \$296,812

Actual: \$261,887

Variance: (\$34,925)

Services, Materials and Other Operating Expenses

Budget: \$40,000

Actual: \$18,518

Variance: (\$21,482)

RESOURCE SUMMARY

Professional Development resources funded more FTE in 2018-19 than in 2017-18. In order to relieve the General Fund, the BSEP Measure E1 resource fully funded the Professional Development Coordinator (increasing BSEP support from .4 FTE to the full 1.0 FTE), added 2.4 FTE to the Berkeley High Professional Development Leaders (for a total of 4.4 FTE) and added 1.0 FTE for the Berkeley High Instructional Technology TSAs. The resource continued to fund Teacher Initiated Professional Development (TIP) with allocations to all district schools. In

¹ BSEP Measure E1 Section 3.a.iv

addition, the fund balance from BSEP Measure A funded .4 FTE for a DigiTech TSA and .6 FTE for a Middle School Lead Literacy Coach.

Savings over the planned budget were recognized from open positions, changes in staffing and unspent funds for certificated hourly, stipends and TIP.

STATUS REPORT

In 2018-19, Professional Development priorities for K-5 included a focus on supporting the implementation of our newly adopted Phonics Program (Fast Track Phonics) , and continued support of content and pedagogical expertise in mathematics. Middle School professional development focus included Highlights from last year included:

- K-8 Literacy Coaches, Response to Intervention Teachers and Education Specialists attended a ten day Slingerland Training to build skill in understanding and supporting reading acquisition.
- District Teachers on Special Assignment (TSA's) planned and presented to all new to BUSD teachers at our New Teacher Orientation days. The trained on core district initiatives: Equity Strategies, Social Emotional Curricula, Engage New York (Math), FOSS (Science), and our Literacy Programs: TCRWP, Fast Track Phonics, and Inquiry by Design.
- Teachers were supported in using *Teacher College Reading and Writing Project (TCRWP)*, *A Story of Units Elementary Math*, and *A Story of Ratios* Middle School Math curriculum to meet the diverse needs of K-5 students.
- 6th-12th Grade teachers continued to be trained in Constructing Meaning to support English Language Learners across content areas.
- Middle School Teachers were afforded the opportunity to attend Inquiry By Design Learning Labs as well as specialized trainings in English Language Development integration and best practices in grammar instruction.
- K-5, Literacy and Math Model Classrooms were hosted by District Literacy and Math Coaches for new BUSD teachers, and teachers in BUSD who had changed grade levels.
- K-8 Teacher Leaders collaborated monthly to provide professional development for sites. Equity Teacher Leaders presented on district equity strategies monthly. Math Teacher leaders presented to grade levels, and departments across the year.
- Berkeley High School ran teacher led inquiry cycles with an emphasis on Culturally Responsive Teaching Practices, including leveraging community circles and intentional journaling for equity.
- *Cultural Competency Foundational Academy* provided support for teachers in building foundational knowledge for infusing culturally responsive practices into their work with students, families, and co-workers.

- Equity Teacher Leaders were given training and collaboration opportunities to develop their capacity as leaders in supporting their sites and in providing teachers with professional development for using equity strategies in their work with students.
- Professional development opportunities for travel and conferences further developed teachers' skills for deeper understanding of curriculum and instructional strategies, improving teacher quality, as well as building capacity for Coaches and Teachers on Special Assignment to better support classroom teachers.

Update FY 2019-20

For 2018-19 funds for Teacher Leader Stipends were allocated in the following manner: 14 Teacher Leaders for Equity, 11 Teacher Leaders for Math, and 1 Transitional Kindergarten (TK) Teacher Leader, for a total of 26 Teacher Leader stipends, one less than originally allocated for 2018-2019.

For the 2019-2020 School Year and beyond, we will continue the Cultural Competency Academies, but working to augment them with site community based work to strengthen our K-8 model for Equitable teaching practices. This would include developing site based teams to engage in ongoing Equity training to implement at their sites.

**BERKELEY UNIFIED SCHOOL DISTRICT
BERKELEY SCHOOLS EXCELLENCE PROGRAM (BSEP)
HIGH QUALITY INSTRUCTION (Measure E1, Resource 0741)
PROFESSIONAL DEVELOPMENT
Expenditures
Annual Report FY 2018/19**

Purpose

*Sixty-six percent (66%) of the available Revenues shall be dedicated annually to reducing class sizes at all District-operated K-12 schools, and may also be allocated to provide funding for **professional development**, classroom support, program evaluation, and expanded course offerings*

Budget Manager: Pasquale Scuderi, Assistant Superintendent for Educational Services
Susanne Reed, Coordinator of Professional Development

| | Adopted Budget 2018/19 As of 7/1/18 | 2nd Interim Budget 2018/19 As of 1/31/19 | Unaudited Actuals 2018/19 As of 6/30/19 | 2nd Interim Budget vs. Unaudited Actuals 2018/19 |
|-------------------------------------|--|---|--|---|
| EXPENDITURES | | | | |
| Certificated Salaries | 1,024,260 | 1,071,468 | 953,984 | (117,484) (1) (2) |
| Employee Benefits | 287,240 | 296,812 | 261,887 | (34,925) (1) (2) |
| Services & Other Operating Expenses | 40,000 | 40,000 | 18,518 | (21,482) (1) |
| TOTAL EXPENDITURES | 1,351,500 | 1,408,280 | 1,234,389 | (173,891) |

Notes

- (1) \$50,000 for Teacher Initiated Professional Development is included in the salary, benefits and services and other operating expenses.
- (2) Savings from certificated hourly, stipends and monthly staffing cost including benefits

**BERKELEY UNIFIED SCHOOL DISTRICT
BERKELY SCHOOLS EXCELLENCE PROGRAM (BSEP)
PROFESSIONAL DEVELOPMENT
Revenue and Expenditures (Measure A, Resource 0855)
Annual Report FY 2018/19**

Purpose

Nine percent (9%) of the available revenues *shall be dedicated to providing professional development for the District's teachers and staff, to assessing the effectiveness of the District's educational programs for improving student achievement, and to providing and maintaining computers and technology in schools.*

Budget Manager: Pasquale Scuderi, Assistant Superintendent for Educational Services
Susanne Reed, Coordinator of Professional Development

| | Audited Actuals 2017/18 As of 6/30/18 | Adopted Budget 2018/19 As of 7/1/18 | 2nd Interim Budget 2018/19 As of 1/31/19 | Unaudited Actuals 2018/19 As of 6/30/19 | 2nd Interim Budget vs. Unaudited Actuals 2018/19 |
|--|--|--|---|--|---|
| REVENUE | | | | | |
| Revenue | 4,892 | 0 | 0 | 0 | 0 |
| Contribution (To)/From Measure A Reserve | 21,738 | 0 | 0 | (635) | (635) (1) |
| NET REVENUE | 26,630 | 0 | 0 | (635) | (635) |
| EXPENDITURES | | | | | |
| Certificated Salaries | 0 | 86,268 | 86,268 | 85,683 | (585) (2) |
| Employee Benefits | 0 | 33,892 | 33,892 | 27,953 | (5,939) (2) |
| Unallocated Reserve | 0 | 0 | 0 | 0 | 0 |
| Services & Other Operating Expenses | 0 | 0 | 0 | 0 | 0 |
| Indirect Costs | 0 | 7,125 | 7,125 | 6,739 | (386) |
| TOTAL EXPENDITURES | 0 | 127,285 | 127,285 | 120,375 | (6,910) |
| NET INCREASE (DECREASE) | 26,630 | (127,285) | (127,285) | (121,010) | 6,275 |
| FUND BALANCE ANALYSIS | | | | | |
| Beginning Fund Balance | 204,894 | 231,524 | 231,524 | 231,524 | 0 |
| Net Increase (Decrease) in Fund Balance | 26,630 | (127,285) | (127,285) | (121,010) | 6,275 |
| Ending Fund Balance | 231,524 | 104,239 | 104,239 | 110,514 | 6,275 |

Notes

(1) Contribution to the Measure A reserve Resource transferred at closing

(2) Resource 0855 funded two positions in 2018-19: .4 FTE for a DigiTech TSA and .6 FTE for a Middle School Lead Literacy Coach.

PROGRAM EVALUATION

BSEP Measure E1, Resource 0741-066

BSEP Measure A, Resource 0856

ANNUAL REPORT: FY 2018-19

UPDATE: FY 2019-20

Measure E1 Purpose

After the District meets the Average Class Size goals as described in 3.A.i., funding may be allocated to provide additional support for teaching and learning, such as professional development, classroom support, program evaluation, and expanded course offerings.¹

Budget Manager: Pasquale Scuderi, Associate Superintendent for Educational Services

Reported by: Bajé Thiara, Associate Superintendent for Educational Services,
Thomas Reinhardt, Coordinator LCAP and BREA

Certificated Salaries and Stipends

Budget: \$263,302

Actual: \$233,906

Variance: (\$29,396)

- Teachers on Special Assignment, K-12 2.8 FTE²
- Certificated Hourly and Stipends for Professional Development

Classified Salaries

Budget: \$105,945

Actual \$106,704

Variance: \$759

- Evaluation and Assessment Analyst 1.0 FTE
- Support Staff 0.5 FTE²

Employee Benefits:

Budget: \$101,305

Actual: \$89,990

Variance: (\$11,315)

Books, Supplies and Equipment

Budget: \$10,000

Actual: \$86

Variance: (\$9,914)

Services and Operating Expenses

Budget: \$67,700

Actual: \$ 69,304

Variance: \$1,604

RESOURCE SUMMARY:

This year marked the first year during which the Research and Evaluation Department was no longer lead by Director. Instead, the work was directed by the Associate Superintendent. No funds were expended from Measure A Resource 0856 during the year.)

¹ BSEP Measure E1 Section 3.a.iv

² Multi-funded to 1.0 FTE

STATUS REPORT

Following is a summary report of the activities accomplished with this BSEP Resource during FY 18-19. Additional activities funded through other sources are not detailed in this report.

Priority activities for 2018-19 included:

- Increased direct collaboration with district and site leaders for formative assessment planning and data review using Illuminate;
- Revision of a set of District indicators (clear, defined, and global student achievement metrics for all sites and grade levels);
- Direct assessment support for all online and state assessments;
- Refined and provided data for grants, work within external community partnerships, District-level and School Board presentations, as well as qualitative surveys for programs and school sites.

Details for some of these priority areas are as follows:

School Support:

All 18 sites, including PreK, Independent-Study and Berkeley Technology Academy, received regular one-on-one support support. Activities included:

- Support for *Professional Learning Communities* linking the LCAP / School Plan Evaluations;
- Providing supplementary data analysis;
- Assisting principals to plan or prepare data presentations to staff or School Site Council (SSC);
- Supporting principals and key support staff (Literacy Leaders, Math Teacher Leaders, Response to Intervention staff, English Learner staff, etc.) in using SBA and other assessment data to inform instructional decision-making;
- Support of the Office of Family Engagement and Equity (OFEE) in monitoring family engagement.
- Assisted with the BHS WASC report
- Supported tracking progress for English Language Development
- Provided data production support for all district assessments, including Assessments in English Language Arts (ELA) and Mathematics for Grades 1-10, three times a year for Elementary and Middle School and twice a year for High School. Writing for MS was four times year but optional with the introduction of a new ELA curriculum.

- Continued support of a Kindergarten Universal Screener.
- Berkeley High School common assessments in Mathematics, World Language, Social-Science, Writing, and Science.
- Data needs for sites' Single Plans for Student Achievement
- Analysis of course grades and other academic outcomes for Berkeley High School
- Data needs for Universal 9th Grade at Berkeley High School
- Support and analysis for student surveys

Administrative and Organizational Support for Assessments

- Duplication and distribution of Assessment Booklets and Scan Sheets / Rubrics for test administration;
- Scanning and reviewing scores for accuracy and score reporting;
- Custom reports to include assessment class profiles and reports of students needing interventions post-assessment.

Update FY 2019-20

During the 2018-19 school year, BREA operated without a Director due to the planned budget reductions, with the work overseen by the Associate Superintendent. The BREA department experienced significant turnover for the 2019-20 school year, with only three staff remaining in their 2017-18 roles. One part-time TSA, previously focused on Secondary support, continues to provide support to Berkeley High School, with some expanded K-12 related duties. A second part-time TSA was on the team for two months before resigning due to an academic commitment. The classified support position has remained consistently staffed through the transition. The Evaluation and Assessment Specialist continues to support the data entry and reporting function, but currently reports to the Department of Technology.

A consulting contract was awarded to Dr. Linda Wing to assess the state of BUSD's data use and needs. Dr. Wing's work concluded in January 2020. In November 2019, a Coordinator was hired to oversee the staffing and restructuring of the BREA department to align to the current and projected district activities requiring BREA support. As of the time of this report, two TSA positions remain posted and unfilled. Given the substantial turnover and lack of leadership during the first half of 2019-20, the activities reported for the 2019-20 year are expected to be reduced to essential core functions.

**BERKELEY UNIFIED SCHOOL DISTRICT
BERKELEY SCHOOLS EXCELLENCE PROGRAM (BSEP)
HIGH QUALITY INSTRUCTION (Measure E1, Resource 0741)
EVALUATION
Expenditures
Annual Report FY 2018/19**

Purpose

Sixty-six percent (66%) of the available Revenues *shall be dedicated annually to reducing class sizes at all District-operated K-12 schools, and may also be allocated to provide funding for professional development, classroom support, **program evaluation**, and expanded course offerings*

Budget Managers: Pasquale Scuderi, Assistant Superintendent for Educational Services

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|-------------------------------------|--|---|--|---|
| EXPENDITURES | | | | |
| Certificated Salaries | 246,718 | 263,302 | 233,906 | (29,396) (1) |
| Classified Salaries | 101,746 | 105,945 | 106,704 | 759 |
| Employee Benefits | 106,659 | 101,305 | 89,990 | (11,315) (1) |
| Books, Supplies and Equipment | 10,000 | 10,000 | 86 | (9,914) (2) |
| Unallocated Reserve | 25,949 | 0 | 0 | 0 |
| Services & Other Operating Expenses | 64,000 | 67,700 | 69,304 | 1,604 |
| TOTAL EXPENDITURES | 555,072 | 548,252 | 499,990 | (48,262) |

(1) Savings from open position due to change in staff assignment, hourly work

(2) Savings from unspent funds for materials and supplies

SCHOOL SITE PROGRAMS

BSEP Measure E1, Resource 0752

BSEP Measure A, Resource 0852

ANNUAL REPORT: FY 2018-19

UPDATE: FY 2019-20

Measure E1 Purpose

Personnel, services and materials to deliver effective and equitable opportunities for student engagement, enrichment, and achievement. Available Revenues may be used for, but are not restricted to...such programs as art and science instruction, academic tutoring and counseling, athletics and student activities, and before and after school programs.¹

Budget Manager: **Natasha Beery, Director of BSEP and Community Relations, with Danielle Perez, BSEP Program Specialist**

The budgeted revenue allocated to the BSEP Site Program funds in FY 2018-19 was \$3,044,126. This allowed for allocations to the sites of \$260 per pupil.² The expenditure budget for FY 2018-19 was based on this revenue allocation to each site, plus the carryover generated by unspent balances for each site.³

Each School Site Council (SSC) developed a School Plan based on district goals as well as the articulated needs of each school. This is a summary of how BSEP Site Program funds were utilized across the district to support the School Plans, based on the Unaudited Actuals for 2018-19. It is important to bear in mind that while BSEP site funds work in concert with other resources such as PTA, Title 1, and grant monies to fund the complete picture of discretionary programs at each site, this document only summarizes BSEP budgets and expenditures.

RESOURCE SUMMARY:

In FY 2018-19, the BSEP Site Program allocation of \$260 per-pupil was an increase of just over 1% from the previous year, after a large 8.5% jump between 2016-17 and 2017-18. Berkeley Technology Academy (BTA) continued to receive its allocation based on an assumption of 150 students, despite its average attendance being much lower. The allocation for Berkeley Independent Study (BIS) was also based on an average of 150 students. The ECE (Preschool) allocation assumed 300 students, a calculation based on the number of full and partial day students across three sites. The Stand-Alone TK program at King CDC received an allocation based on an estimated 53 students.

¹ BSEP Measure E1 Section 3.B.iii

² Revenue is allocated to each school site based on prior-year enrollment. For Independent Study, Berkeley Technology Academy, and Early Childhood Education, the allocation is based on an agreed-upon average.

³ The Fund Balance consists of monies that are held centrally, as well as unspent balances (carryover) from the prior year. Unspent balances include the difference between the budget allocated to each site and actual expenditures. In FY 2018-19, unspent balances from the prior year (from Measures A and E1) of \$693,863 were posted as carryover, along with the associated Indirect Cost, once the books were closed in September.

The four largest areas of expenditure from BSEP Site Program Funds (both Measures A and E1 combined) were:

1. Staffing (78.62% of total actual expenditures)

| | | | | | |
|----------------|-----------------------|----------------|--------------------|------------------|--------------------|
| <i>Budget:</i> | <i>\$2,376,304</i> | <i>Actual:</i> | <i>\$2,143,876</i> | <i>Variance:</i> | <i>(\$232,429)</i> |
| ● | Certificated Salaries | | \$ 1,233,970 | | |
| ● | Classified Salaries | | \$ 328,406 | | |
| ● | Employee Benefits | | \$ 466,739 | | |
| ● | Certificated Hourly | | \$ 25,027 | | |
| ● | Classified Hourly | | \$ 77,814 | | |
| ● | Substitutes | | \$ 2,920 | | |
| ● | Stipends | | \$ 9,000 | | |

2. Contracted Services (8.89% of total actual expenditures)

| | | | | | |
|----------------|------------------|----------------|------------------|------------------|-------------------|
| <i>Budget:</i> | <i>\$309,337</i> | <i>Actual:</i> | <i>\$242,545</i> | <i>Variance:</i> | <i>(\$66,792)</i> |
|----------------|------------------|----------------|------------------|------------------|-------------------|

3. Books, Supplies and Equipment (6.89% of total actual expenditures)

| | | | | | |
|----------------|------------------|----------------|------------------|------------------|--------------------|
| <i>Budget:</i> | <i>\$353,753</i> | <i>Actual:</i> | <i>\$187,774</i> | <i>Variance:</i> | <i>(\$165,979)</i> |
|----------------|------------------|----------------|------------------|------------------|--------------------|

4. Indirect Costs (5.60% of total expenditures)

| | | | | | |
|----------------|------------------|----------------|------------------|-----------------|-------------------|
| <i>Budget:</i> | <i>\$201,199</i> | <i>Actual:</i> | <i>\$152,650</i> | <i>Variance</i> | <i>(\$48,549)</i> |
|----------------|------------------|----------------|------------------|-----------------|-------------------|

At the end of FY 2018-19, all sites had unexpended funds in their BSEP Site Program budgets, though that amount varied widely.

- Overall in 2018-19, sites expended 75.87% of available funds (including carryover).
- On average, the 11 elementary sites expended 82.38% of their overall budgets, ranging from a low of 62.67% to a high of 94.55%.
- The three middle schools expended an average of 65.08% of their total budgets. King expended 78.36%, Longfellow expended 70.93%, and Willard expended 43.10%⁴.
- Berkeley High expended 77.82% of its available budget.
- BIS expended 93.45% of its budget, while BTA expended 84.27%.
- ECE expended 38.88%⁵ of its budget while TK expended 60.70%.

Additionally, note that all elementary sites received an extra \$1,000 for mental health services from LCAP funding at the start of 2018-19, which reduced BSEP site fund contributions for that purpose at six of the 11 schools. This is an example of how sites prioritize using one-time funds, which can increase BSEP site fund carryover for the following year.

⁴ Willard began 2018-19 with over \$75,000 in carryover, and one-time increases from LCAP and Title 1 resources in 2018-19 further reduced expense to BSEP site funds. See FY 2019-20 Update below for details on spending plans for this carryover moving forward.

⁵ See FY 2019-20 Update below for more details and spending plans moving forward.

BSEP Office staff helped principals to prioritize spending Measure A carryover funds wherever possible. At the end of the year, expenses were moved from Measure E1 to Measure A at each site to fully utilize Measure A balances. This had the effect of eliminating Measure A budgets from all sites but BHS, reducing the number of budget codes that principals had to be aware of and monitor moving into 2019-20.

All unspent BSEP Measure E1 Site Program dollars from 2018-19 were carried over to 2019-20 budgets. Under both Measures A and E1 the purpose of Site Funds remains consistent, and site budgets may draw upon both Measure A and Measure E1 carryover funds until they are completely expended.

STATUS REPORT

Site Program funds supported a variety of purposes, with each site's plan reflecting the needs and priorities of the school.

As is true for most BSEP budgets, the majority of these Site Program funds (78.62% of total expenses) pay for **certificated and classified staff**. Elementary school plans included a variety of staffing funded from BSEP site money. Every elementary school contributed site funds toward .25 FTE of a Literacy Coach, with 9 of 11 schools spending at least some BSEP site funds for this purpose, while two schools used only Title I funds for this. Other funded positions included:

- Salaries for Teachers on Special Assignment (TSAs) for RtI, ELD, Math and Reading Intervention; Counselors; and teachers in Dance, PE, and Art.
- Salaries for classified PE, Dance, and Drama Instruction; Instructional Assistants (IAs); and a School Service Assistant.
- Hourly pay for both certificated and classified personnel to work in intervention, tutoring, staff collaboration and curriculum/professional development.

At the middle school level, BSEP site funds supported:

- Salaries for Vice Principals, Counselors, and classroom teachers in Music, Creative Writing, Math, Art and Academic Support classes.
- Hourly work in Intervention, Noon Supervision, and Curriculum/Professional development.

At Berkeley High, site funds provided staff pay for the following work:

- Direct instruction and support in the classroom;
- Coordination of student services;
- Student advising;
- Hourly tutoring;
- Staffing for family outreach and support positions for English Learner families;
- Volunteer coordination; and
- Welfare and attendance oversight.

At Berkeley Technology Academy (BTA), site funds contributed support of 0.47 FTE for the full-time Student Welfare and Attendance Specialist. In the Independent Study Program (BIS),

site funds provided an instructional specialist in gardening and paid for hourly tutoring in ELA and Math.

The next largest area of expenditure, at 8.89% of the total budget, was for **contracted services**. Many sites contracted for behavioral/mental health services, PE instruction, and Assemblies, as well as mentoring, coaching and tutoring services. BHS contracted for music coaching and the R.I.S.E. Scholar program, while BIS funded a contract providing Occupational Therapy. BTA contracted with Village Connect using BSEP, Title 1, and grant funding. Contract budgets also covered field trip admissions and non-BUSD transportation services.

BSEP site funds continue to be an important resource for instructional **materials**, constituting 6.89% of the total expenditures to pay for books, materials, supplies and equipment.

While priorities vary from site to site, and vary considerably between primary and secondary schools, activities supported by BSEP site program funds all served to further the District's goals of improving academic achievement and promoting student success.

FUND BALANCES

Measure E1, Resource 0752

Beginning: \$557,321

Ending: \$1,253,941

Increase: \$696,620

Measure A, Resource 0852

Beginning: \$507,935

Ending: \$196,148

Decrease: \$311,787

2018-19 SITE PLAN ADDENDA SUMMARY:

Over the course of a school year, principals and SSCs may choose to re-allocate site funds as needs arise or as available programs or staff change. These changes are recorded in Site Plan Addenda, and in 2018-19 SSCs made the following changes to their Plans and budgets:

- Emerson allocated \$2,000 from unallocated carryover to provide kindergarten tutoring in phonemic awareness and letter sound and number recognition, as well as reallocating \$500 of carryover money from materials and supplies to pay SpEd IAs to attend hourly professional development staff meetings.
- Sylvia Mendez re-allocated money saved from Behavioral Health Counselor salary (due to the increase in behavioral health allocations from LCAP) to provide an additional \$1,000 in teacher hourly pay for professional development work.
- Oxford used \$5,000 of unallocated carryover funds to pay for hourly classified tutors;
- Thousand Oaks allocated \$4,691 for teacher hourly pay and \$1,300 for materials and supplies to provide after-school academic intervention and STEM classes.
- Washington allocated \$18,300 to increase Literacy Coach/Interventionist positions from unallocated carryover.
- Rosa Parks allocated \$9,000 from carryover for materials and supplies.

- Malcolm X allocated \$12,500 from carryover for materials and supplies.
- John Muir allocated \$5,500 from carryover for a K-2 Chromebook cart.
- TK allocated \$300 from carryover to provide child care at parent meetings, reallocated \$495 from substitute pay to increase the classroom materials budget, reallocated \$480 from transportation costs to pay for assembly presenters, moved \$3,737 from carryover and unused contract/PD budgets to purchase outdoor games and play equipment, and shifted \$78 from unused supplies money to pay custodial overtime to support a school-wide assembly.
- Willard allocated \$5,500 from unused current-year funds to increase a mentoring intervention contract.
- BTA allocated \$4,591 of carryover to contribute to the Village Connect contract.
- BHS allocated \$1,500 from carryover to pay for hourly work to support SSC meetings (minutes-taking), and another \$10,000 from carryover to fund a contract with the R.I.S.E. tutoring program.

Update FY 2019-20:

Site fund allocations increased from \$260 per pupil in 2018-19 to \$285 per pupil in 2019-20, thanks to increased BSEP revenues. Sites with larger carryover balances coming in to 2019-20 have made plans for spending down those resources. Brief summaries of some of the larger planned carryover expenditures are below:

- Berkeley High's plan for 2019-20 includes spending \$185,000 of carryover site funds, providing for one-time programs and investments including \$50,000 in technology cohort devices, \$25,530 for a contract to provide a program coordinator for the Biotech Partners program, and temporary increases in FTE for three TSAs, the College and Career Administrative Assistant, and the Instructional Media Tech.
- Willard's 2019-20 plan has allocated \$30,000 to contract with Mills Teacher Scholars for a year of inquiry-based professional development, funded \$26,000 for an additional part-time staff member to support the Growing Leaders program, and provided \$13,000 to re-implement a contract with Writer Coach. Additionally, the plan has allocated investments in materials and supplies up to \$30,000 for STEM and \$5,000 for Art.
- The 2019-20 Thousand Oaks plan shifted the IA position from bilingual (which went two years unfilled) to monolingual, which will result in the permanent hiring of a staff person to fully realize the projected position costs. The school has also committed \$20,000 to support literacy through FTE for two retired teachers (which can be paid out of carryover), as well as increasing other BSEP site-funded certificated FTE from .47 to .77.
- The Preschool (ECE) program's 2019-20 plan includes funding .53 FTE for the bookbag IA. In '18-19 the Library program funded the Bookbag IA as an hourly position, though in prior years the work had been co-funded with Site funds. Additionally, the .6 FTE RTI position that was unfilled for half of the previous year has been filled, and so should expend the full planned cost this year.

**BERKELEY UNIFIED SCHOOL DISTRICT
BERKELEY SCHOOLS EXCELLENCE PROGRAM (BSEP)
SCHOOL SITE PROGRAMS (Measure E1, Resource 0752)
Revenue and Expenditures
Comparison Report FY 2018-19**

Mission Statement

Ten and a quarter percent (10.25%) of the available revenues shall be *allocated annually for School Site Programs to each K-12 school on a per pupil basis. Existing district preschools shall receive a similar allocation for each full time student. The School Site Council (as described in Section 8.C.) shall develop recommendations to allocate these revenues for the personnel, services and materials required to deliver effective and equitable opportunities for student engagement, enrichment, and achievement. Available Revenues may be used for, but are not restricted to, the personnel, materials and services required to deliver such programs as art and science instruction, academic tutoring and counseling, athletics and student activities, and before and after school programs.*

Budget Managers: Natasha Beery, Director of BSEP and Community Relations

| | Audited Actuals 2017/18 As of 6/30/18 | Adopted Budget 2018/19 As of 7/1/18 | 2nd Interim Budget 2018/19 As of 1/31/19 | Unaudited Actuals 2018/19 As of 6/30/19 | 2nd Interim Budget vs. Unaudited Actuals 2018/19 |
|---|--|--|---|--|---|
| REVENUE | 2,890,235 | 3,044,126 | 3,073,891 | 3,113,685 | 39,794 (1) |
| EXPENDITURES | | | | | |
| Certificated Salaries | 1,177,716 | 1,228,080 | 1,361,796 | 1,198,959 | (162,837) |
| Classified Salaries | 396,548 | 397,485 | 442,230 | 400,776 | (41,454) |
| Employee Benefits | 405,594 | 518,538 | 507,101 | 424,457 | (82,644) |
| Books & Supplies | 73,735 | 96,515 | 222,711 | 93,739 | (128,972) |
| Equipment | 2,030 | 0 | 3,325 | 2,814 | (511) |
| Unallocated Reserve and Carryover | 0 | 203,251 | 291,641 | 0 | (291,641) |
| Contracted Services | 146,070 | 255,191 | 268,276 | 161,012 | (107,264) |
| Indirect Costs | 131,221 | 160,054 | 183,656 | 135,308 | (48,348) |
| TOTAL EXPENDITURES | 2,332,914 | 2,859,114 | 3,280,736 | 2,417,065 | (863,671) |
| NET INCREASE (DECREASE) | 557,321 | 185,012 | (206,845) | 696,620 | 903,465 |
| FUND BALANCE ANALYSIS | | | | | |
| Beginning Fund Balance | 0 | 557,321 | 557,321 | 557,321 | 0 |
| Net Increase (Decrease) in Fund Balance | 557,321 | 185,012 | (206,845) | 696,620 | 903,465 |
| Ending Fund Balance | 557,321 | 742,333 | 350,476 | 1,253,941 | 903,465 |

Notes

- (1) Revenue is allocated to each school site based on the projected number of students for the year (CALPADS data). The projection is adjusted for Berkeley Independent Study (BIS), Berkeley Technology Academy (BTA) and Early Childhood Development. BIS and BTA received funding based on 150 students. Early Childhood received funding based on 300 students. In FY 2018-19, adjusted enrollment was 10,381.

BERKELEY UNIFIED SCHOOL DISTRICT
BERKELEY SCHOOLS EXCELLENCE PROGRAM (BSEP)
SCHOOL SITE DISCRETIONARY PROGRAM (Measure A, Resource 0852)
Revenue and Expenditures
Comparison Report FY 2018-19

Mission Statement

Ten and a quarter percent (10.25%) of the available revenues generated by this measure is *allocated annually as School Discretionary Funds to each K-12 school on a per pupil basis. Existing district preschools shall receive a similar allocation for each full time student. The School Governance Council shall develop recommendations to allocate these revenues for the personnel, service and materials required to deliver effective activities leading to improved student performance.*

Budget Managers: Natasha Beery, Director of BSEP and Community Relations
Danielle Perez, BSEP Program Specialist

| | Audited Actuals 2017/18 As of 6/30/18 | Adopted Budget 2018/19 As of 7/1/18 | 2nd Interim Budget 2018/19 As of 1/31/19 | Unaudited Actuals 2018/19 As of 6/30/19 | 2nd Interim Budget vs. Unaudited Actuals 2018/19 |
|--|--|--|---|--|---|
| REVENUE | | | | | |
| Revenue | 15,477 | 0 | 0 | 0 | 0 |
| Contribution (To)/From Measure A Reserve | 68,771 | 0 | 0 | (2,009) | (2,009) (1) |
| Net Revenue | 84,248 | 0 | 0 | (2,009) | (2,009) |
| EXPENDITURES | | | | | |
| Certificated Salaries | 61,122 | 0 | 47,199 | 71,957 | 24,758 |
| Classified Salaries | 62,235 | 0 | 7,303 | 20,886 | 13,583 |
| Employee Benefits | 17,087 | 0 | 10,675 | 26,840 | 16,165 |
| Books & Supplies | 79,510 | 0 | 127,717 | 86,430 | (41,287) |
| Equipment | 8,042 | 0 | 0 | 4,791 | 4,791 |
| Unallocated Reserve and Carryover | 0 | 0 | 61,888 | 0 | (61,888) |
| Contracted Services | 53,989 | 0 | 41,061 | 81,533 | 40,472 |
| Indirect Costs | 16,806 | 0 | 17,543 | 17,341 | (202) |
| TOTAL EXPENDITURES | 298,791 | 0 | 313,386 | 309,778 | (3,608) |
| NET INCREASE (DECREASE) | (214,543) | 0 | (313,386) | (311,787) | 1,599 |
| FUND BALANCE ANALYSIS | | | | | |
| Beginning Fund Balance | 722,478 | 507,935 | 507,935 | 507,935 | 0 |
| Net Increase (Decrease) in Fund Balance | (214,543) | 0 | (313,386) | (311,787) | 1,599 |
| Ending Fund Balance | 507,935 | 507,935 | 194,549 | 196,148 | 1,599 |

Notes

(1) Contribution to the Measure A reserve Resource transferred at closing

BSEP Measure E1, Resource 0761
BSEP Measure A, Resource 0860

RESOURCE SUMMARY

In FY 2018-19, for this second year of Measure E1, actual revenue and expense for this Resource was close to the budget proposed in the plan. Variances can be seen mostly in slightly lower costs for employee benefits and salaries.

As BSEP resources tend to start strong then diminish due to increased costs over the course of the Measure, a strong Fund Balance during the first half of the measure lifespan is prudent, to be available to draw upon during the latter years of the Measure.

Measure A Funds

Carryover funds from Measure A Library Resource 0860 amount to approximately \$170K. Those were planned to be applied to the installation of short throw projectors in our school libraries. In FY 2018-19, the Measure A funds were not used. The plan to upgrade technology in the school libraries will be reviewed and implemented during the current school year.

STATUS REPORT

BSEP funds provide the backbone for library staffing and resources throughout the Berkeley school system, with a core mission of addressing every student's academic and independent reading needs with a wide range of books, online resources and integrated programming all with an eye toward diversity.

Core Library Program:

- Staffing for all libraries, open every school day.
- Materials for all students PreK- Grade 12 at \$8 per pupil.
- Book bag circulation program materials and staffing at all Early Childhood Education sites with weekly read-alouds and check outs.
- Weekly visits at the elementary schools for all classes TK-5, including read-alouds, library lessons and time to select and check out books.
- At secondary sites, all teachers may schedule classes as needed to visit for the purposes of book talks, research lessons, technology exploration.
- At Berkeley High School (BHS), the Teacher Librarians worked in collaboration with the U9 (Universal 9th Grade) to establish independent reading opportunities and curriculum, and establish common expectations around research protocols. All 9th grade classes visited the library at least 6 times.
- Two Teacher Librarians on Special Assignment (TSA) support the elementary library programs with resources and professional development as well as supporting the use of Instructional Technology throughout the district. This year, one position was funded partially (.40 FTE) by the Professional Development department.

- Outside of the regular school year, the BEARS Summer School Library program continued in the summer of 2019, with a Library Media Specialist at all three BEARS/EDC summer school sites.

Highlights of the Library Program from 2018-19:

- Over 260,000 items were circulated in the K-12 schools in 2018-19, similar to previous years.
- A collaborative project with Berkeley Public Library brought audiobook and ebook access to all students in grades 3 – 12 via the Sora app.
- Author Patricia Newman visited five elementary schools in May, bringing a focus to inquiry and research while talking about her non-fiction writing on environmental topics.
- Author Elizabeth Acevedo spoke at BHS to over 1000 students including all of the 9th grade as well as visiting Willard and Longfellow Middle Schools.
- Additional author visits included: Alex Giardino, who visited all of the Mock Newbery clubs, Jen Wang at Willard, Adam Rubin at Cragmont, K-Fai Steele and Andrea Tsurumi at John Muir and Emerson, Andrew Smith at King, Mac Barnett at Malcolm X and Washington, as well as numerous virtual author visits via Skype.
- A grant through the American Library Association and partnership with the Berkeley Public Library brought the “Great Stories” club to Longfellow Middle School.
- Mock Newbery Book Clubs at all elementary schools and Battle of the Books at the three middle schools, along with additional book clubs and lunchtime events actively engage students in creating a “buzz” around books.
- The Library for the State of California provided access to all schools in California for free this year, saving BUSD \$14K that had previously supported access to online encyclopedias and databases. All library staff received professional development around these newly available resources for student research.
- An additional \$5000 was expended for Spanish language books for the Sylvia Mendez Elementary and Longfellow Middle School libraries which each provide Two-Way Immersion Spanish language programs at their sites.

Program Update FY 2019-20:

Jessica Lee has stepped into the role of Library Coordinator in July, upon the retirement of Library Coordinator Becca Todd. In FY 2018-19 she worked as a TSA for the library department supporting many of the programs in this document.

**BERKELEY UNIFIED SCHOOL DISTRICT
BERKELEY SCHOOLS EXCELLENCE PROGRAM (BSEP)
LIBRARY PROGRAM (Measure E1, Resource 0761)
Revenue and Expenditures
Comparison Report FY 2018-19**

Purpose

Seven and a quarter percent (7.25%) of revenues dedicated to the Programs to Enhance Student Learning shall be allocated annually to provide student access to quality school libraries which shall be maintained by providing library staff to operate the District's K-12 school and other specialized libraries, and by allocating revenues for books, materials, services and equipment for the school libraries.

Budget Manager: Pasquale Scuderi, Associate Superintendent for Educational Services
Becca Todd, District Library Coordinator

| | (a) | (b) | (b)-(a) | |
|---|------------------|------------------|------------------|-----------------|
| | 2nd | 2nd | 2nd | |
| | Adopted | Interim | Unaudited | Interim |
| | Budget | Budget | Actuals | Budget vs. |
| | 2018/19 | 2018/19 | 2018/19 | Unaudited |
| | As of | As of | As of | Actuals |
| | 7/1/18 | 1/31/19 | 6/30/19 | 2018/19 |
| REVENUE | 2,153,163 | 2,174,216 | 2,185,520 | 11,304 (1) |
| EXPENDITURES | | | | |
| Certificated Salaries | 630,336 | 630,336 | 648,953 | 18,617 (2) |
| Classified Salaries | 612,809 | 642,357 | 627,069 | (15,288) (2) |
| Employee Benefits | 507,466 | 510,734 | 476,130 | (34,604) (2) |
| Books & Supplies | 91,775 | 105,901 | 101,195 | (4,706) |
| Equipment | 5,000 | 5,000 | 0 | (5,000) |
| Unallocated Reserve | 98,179 | 27,837 | 0 | (27,837) (3) |
| Services & Other Operating Expenses | 29,425 | 52,825 | 41,926 | (10,899) |
| Indirect Costs | 117,058 | 117,058 | 112,390 | (4,668) |
| TOTAL EXPENDITURES | 2,092,048 | 2,092,048 | 2,007,663 | (84,385) |
| NET INCREASE (DECREASE) | 61,115 | 82,168 | 177,857 | 95,689 |
| FUND BALANCE ANALYSIS | | | | |
| Beginning Fund Balance | 124,830 | 124,830 | 124,830 | 0 |
| Net Increase (Decrease) in Fund Balance | 61,115 | 82,168 | 177,857 | 95,689 |
| Ending Fund Balance | 185,945 | 206,998 | 302,687 | 95,689 |

(1) Increased due to receipt of prior year and additional current year revenue in 2018-19

(2) 1% salary increase for certificated staff and a 2% salary increase for classified staff

(3) Unallocated Reserve was utilized for additional allocations for books, audiobooks, author visits, and travel and conference expenses

BERKELEY UNIFIED SCHOOL DISTRICT
BERKELEY SCHOOLS EXCELLENCE PROGRAM (BSEP)
LIBRARY PROGRAM (Measure A, Resource 0860)
Revenue and Expenditure
Comparison Report FY 2018-19

Purpose

Seven and a quarter percent (7.25%) of revenues dedicated to the Programs to Enhance Student Learning *shall be allocated annually to provide student access to quality school libraries which shall be maintained by providing library staff to operate the District's K-12 school and other specialized libraries, and by allocating revenues for books, materials, services and equipment for the school libraries.*

Budget Manager: Pasquale Scuderi, Associate Superintendent for Educational Services
Becca Todd, District Library Coordinator

| | (a) | | | (b) | (b)-(a) |
|--|---------------|-----------------|-----------------|----------------|-----------------|
| | Audited | Adopted | 2nd | Unaudited | 2nd |
| | Actuals | Budget | Interim | Actuals | Interim |
| | 2017/18 | 2018/19 | 2018/19 | 2018/19 | Budget vs. |
| | As of | As of | As of | As of | Unaudited |
| | 6/30/18 | 7/1/18 | 1/31/19 | 6/30/19 | Actuals |
| | | | | | 2018/19 |
| REVENUE | | | | | |
| Revenue | 10,948 | 0 | 0 | 0 | 0 |
| Contribution (To)/From Measure A Reserve | 48,643 | 0 | 0 | (1,421) | (1,421) (1) |
| TOTAL REVENUE | 59,591 | 0 | 0 | (1,421) | (1,421) |
| EXPENDITURES | | | | | |
| Certificated Salaries | 0 | 0 | 0 | 0 | 0 |
| Classified Salaries | 0 | 0 | 0 | 0 | 0 |
| Employee Benefits | 0 | 0 | 0 | 0 | 0 |
| Books & Supplies | 0 | 0 | 0 | 0 | 0 |
| Equipment | 0 | 0 | 0 | 0 | 0 |
| Unallocated Reserve | 0 | 4,744 | 4,744 | 0 | (4,744) |
| Services & Other Operating Expenses | 0 | 80,000 | 80,000 | 0 | (80,000) |
| Indirect Costs | 0 | 0 | 5,025 | 0 | (5,025) |
| TOTAL EXPENDITURES | 0 | 84,744 | 89,769 | 0 | (89,769) |
| NET INCREASE (DECREASE) | 59,591 | (84,744) | (89,769) | (1,421) | 88,348 |
| FUND BALANCE ANALYSIS | | | | | |
| Beginning Fund Balance | 109,499 | 169,089 | 169,089 | 169,089 | 0 |
| Net Increase (Decrease) in Fund Balance | 59,591 | (84,744) | (89,769) | (1,421) | 88,348 |
| Ending Fund Balance | 169,090 | 84,345 | 79,320 | 167,668 | 88,348 |

(1) Contribution to the Measure A reserve Resource transferred at closing

MUSIC, VISUAL AND PERFORMING ARTS

BSEP Measure E1, Resource 0753

BSEP Measure A, Resource 0853

ANNUAL REPORT: FY 2018-19 PROGRAM UPDATE: FY 2019-20

Measure E1 Purpose:

Providing quality instructional programs in music and the visual and performing arts for elementary and middle school students. Available Revenues may be used for, but are not restricted to, providing qualified teachers and staff, and professional development in the arts for elementary and secondary students. Musical instruments, instructional materials, equipment and necessary services may be provided for any K-12 school, as long as funds permit.¹

Budget Managers: Pete Gidlund, VAPA Program Supervisor
Pasquale Scuderi, Associate Superintendent for Educational Services

BACKGROUND INFORMATION

Fourth and fifth grade students receive music instruction twice per week during two of the four periods that are contractually required for classroom teacher preparation (aka “release time”) at those grade levels. (The other two teacher preparation periods are filled with classroom instruction in science, art, or dance, with release time teachers paid for from the General Fund.)

Half of the cost of music release time teachers is funded by BSEP and half is funded by the General Fund. BSEP also provides supplemental music teachers for fourth and fifth grades in order to provide smaller classes and expand options for students at each music period, including brass, woodwind, and string classes. Students in fourth and fifth grade are scheduled into music classes of 12-18 students according to choice of instrument. Providing smaller classes to focus on one or two instruments ensures all students will successfully meet grade level music standards. Without these supplemental teachers, classes would be at 24-26 students with fewer instruments taught in the same class. These supplemental teachers are paid for entirely by this BSEP resource. Instruments, instrument repairs, and materials are also funded by BSEP.

Beyond the fourth and fifth grades, this resource provides funding for music, and visual and performing arts instruction at the Middle Schools, as well as a Program Supervisor, a Visual and Performing Arts Technician, professional development, and a number of events and activities related to the music and visual and performing arts programs from fourth through eighth grades.

2018-19 MUSIC/VAPA FUND – REVENUE AND EXPENDITURES

Release Time Teachers: Transfer to General Fund

Budget: (\$244,500)

Actual: (\$239,002)

Variance: \$5,498

¹ BSEP Measure E1, Section 3.B.ii

- Release Time Teachers: 50% of 4.64 FTE

Certificated Salaries

Budget: \$815,662 Actual: \$798,014 Variance: (\$17,648)

- Supplemental Music Teachers 4.56 FTE
- Middle School Music and Art Teachers 3.64 FTE
- Elementary Arts Anchor 0.25 FTE
- Middle School Elective/After School Art 0.60 FTE
- Program Supervisor 1.00 FTE

In total, with both release time and supplemental music teachers, the FTE for the fourth and fifth grade music program required 9.20 FTE.

Classified Salaries

Budget: \$25,624 Actual \$25,430 Variance: (\$194)

- VAPA Technician: 0.6 FTE

Classified salaries include the Music Library Coordinator as well as time for Instructional Specialists and a limited amount of hourly work to support the program.

Employee Benefits:

Budget: \$267,442 Actual: \$256,940 Variance: (\$10,502)

Instructional Materials, Instruments and Equipment

Budget: 90,311 Actual: \$81,967 Variance: (\$8,344)

Conference/Mileage/Instructional Contracts

Budget: \$175,300 Actual: \$121,398 Variance: (\$53,902)

Indirect Costs

Budget: \$98,497 Actual: \$90,299 Variance: (\$8,198)

Fund Balance

Beginning: \$299,079 Ending: \$570,098 Increase: \$271,019

RESOURCE SUMMARY

In creating the budget models for BSEP Measure E1, it was anticipated that certain resources, such as Class Size Reduction and Music/VAPA, would need to maintain a significant fund balance as a reserve in the initial years of the Measure, given the potential for increasing costs of staffing and materials over the course of the Measure. This year at First Interim 2019-20, the fund balance decreased to \$486,441 due to increased expenses, in part due to the 2.5% retroactive salary increase. There will also be another 2.5% increase to budget for in 2020-21.

Measure A Funds

Measure A carryover funds were approved and spent in 2018-19 as part of a “deferred maintenance initiative” with a purpose to replenish the district’s “large fleet” instruments such as double bass, large brass, pianos, etc. Expenditures for the year totaled \$63,642, leaving an ending fund balance of \$441,916. In 2019-20, the “deferred maintenance initiative” continues with a plan to expend \$200,000 from this Resource.

STATUS REPORT

The foundation for Music, and Visual and Performing Arts (VAPA) in BUSD elementary and middle schools is provided through this BSEP funding. Following is an overview of the program currently funded through BSEP:

Core Music and VAPA Programs:

- Staffing and materials for the grades 4-8 Music Program, including music classes for all fourth and fifth graders;
- Staffing support for afterschool arts classes at the middle schools;
- Drama materials for grades 6-8;
- Support for the Berkeley Symphony Orchestra Music in the Schools Program (MITS) at eleven elementary schools;
- Professional development for classroom teachers in arts integration at ten elementary schools (Arts Anchor Allocations);
- Professional development for music teachers; year five of Mills Scholars inquiry work;
- Staffing support for outreach programs and partnerships such as Arts on The Run, Berkeley Arts Education Steering Committee (BAESC), Cazadero Music Camp, The Music Connection (TMC), the Performing Arts Showcase, and Schools Fund grants for things like arts provider residencies and music lesson scholarships for students in need.
- Staffing support for partnerships with community arts organizations such as Cal Performances, Berkeley Art Museum and Pacific Film Archive (BAMPFA), Berkeley Repertory Theatre, MOCHA, Freight & Salvage, KALA, The Kennedy Center (DC), and the Alonzo King LINES Ballet.

Highlights of the Music and VAPA program from 2018-19 include:

- All fourth and fifth graders participated in the music program, regardless of ability to pay for instruments.
- Due to strategic hiring and scheduling, we continue to offer a wider selection of instruments, including ukulele, guitar, drumline, mariachi, and African drumming, while maintaining similar FTE.
- All students were provided with a well-functioning instrument of their choosing, grade level method books, supplemental sheet music, and necessary accessories such as strings, valve oil and cork grease.

- Music teachers continued “in house” cultural responsiveness training. As well, our teacher-leader run MILLS/PLC inquiry work focused on equity.
- About 400 students played the National Anthem at an A’s game in April, with a smaller group of 150 playing the National Anthem at a Cal Baseball game in April. Also in May of 2018 the combined middle school choruses sang the national anthem at a separate A’s game.
- Collaborative partnerships provided workshops, tutoring, and performances by professional musicians for Berkeley students K-12.
- The middle school jazz bands played at Freight & Salvage and Yoshi’s.
- Many middle school students played and/or sang in multiple ensembles.
- The winter and spring concerts were very well-attended, especially at the middle schools, where the students played to packed houses. Nearly 2,000 family and community members attended the Performing Arts Showcase in March, 2019.
- VAPA maintained its successful new Kennedy Center “Partners in Education” partnership with the Alonzo King LINES Ballet, who is offering in-class dance integration training and out-of-class professional development for BUSD teachers. This partnership also continues to qualify VAPA to receive support from the Kennedy Center.
- Brand new After School arts funding- our Arts Anchor Extension Pilot provided the following resources to provide equitable arts opportunities for our students:

0.6 FTE funding Middle School Arts electives:

- King- Ceramics
- Willard- Drama
- Longfellow- Digital Arts

\$8,000 funded after school Arts at each of :

- John Muir - Museum of Children’s Art (MoCHA)
- Washington - Drama, Drums, Dance
- Sylvia Mendez - Drumming

Program Update FY 2019-20

As the VAPA department continues to make equity its first priority, we continue to hire teachers that have a background/training in culturally responsive teaching as well as diverse musicological backgrounds. Our staff is continually becoming more diverse as well.

In Spring 2019 a group called the Music Diversity Committee formed and is still active and vibrant. The group is made up of parents, students, music teachers, and VAPA supervisor, with a primary goal of supporting families of color in a way that provides information on and access to BUSD VAPA’s music program.

BERKELEY UNIFIED SCHOOL DISTRICT
BERKELEY SCHOOLS EXCELLENCE PROGRAM (BSEP)
MUSIC , VISUAL AND PERFORMING ARTS (Measure E1, Resource 0753)
Revenue and Expenditures
Comparison Report FY 2018-19

Purpose

Six and a quarter percent (6.25%) of the Available Revenues *shall be allocated annually to providing quality instructional programs in music and the visual and performing arts for elementary and middle school students. Available Revenues may be used for, but are not restricted to, providing qualified teachers and staff, and professional development in the arts for elementary and secondary students. Musical instruments, instructional materials, equipment and necessary services may be provided for any K-12 school, as long as funds permit.*

Budget Managers: Pasquale Scuderi, Associate Superintendent for Educational Services
Pete Gidlund, VAPA Program Supervisor

| | (a) | (b) | (b)-(a) | |
|--|------------------|------------------|------------------|------------------|
| | Adopted | 2nd Interim | Unaudited | 2nd Interim |
| | Budget | Budget | Actuals | Budget vs. |
| | 2018/19 | 2018/19 | 2018/19 | Unaudited |
| | As of | As of | As of | Actuals |
| | 7/1/18 | 1/31/19 | 6/30/19 | 2018/19 |
| REVENUE | | | | |
| Revenue | 1,856,175 | 1,874,324 | 1,884,069 | 9,745 (1) |
| Transfers to General Fund (Release Time) | (244,500) | (244,500) | (239,002) | 5,498 (2) |
| TOTAL REVENUE | 1,611,675 | 1,629,824 | 1,645,067 | 15,243 |
| EXPENDITURES | | | | |
| Certificated Salaries | 805,874 | 815,662 | 798,014 | (17,648) (3) |
| Classified Salaries | 23,711 | 25,624 | 25,430 | (194) (3) |
| Employee Benefits | 288,126 | 267,442 | 256,940 | (10,502) (3) |
| Instructional Materials/Instruments | 74,000 | 75,311 | 67,748 | (7,563) |
| Equipment | 15,000 | 15,000 | 14,219 | (781) |
| Unallocated Reserve | 110,489 | 42,161 | 0 | (42,161) (4) |
| Conference/Mileage/Instructional Contracts | 99,300 | 175,300 | 121,398 | (53,902) |
| Capital Outlay | 0 | 0 | 0 | 0 |
| Indirect Costs | 98,497 | 98,497 | 90,299 | (8,198) |
| TOTAL EXPENDITURES | 1,514,997 | 1,514,997 | 1,374,048 | (140,949) |
| NET INCREASE (DECREASE) | 96,678 | 114,827 | 271,019 | 156,192 |
| FUND BALANCE ANALYSIS | | | | |
| Beginning Fund Balance | 299,079 | 299,079 | 299,079 | 0 |
| Net Increase (Decrease) in Account Balance | 96,678 | 114,827 | 271,019 | 156,192 |
| Ending Account Balance | 395,757 | 413,906 | 570,098 | 156,192 |

Notes

- (1) Increase due to receipt of prior year and additional current year revenue in 2018-19
- (2) This is the historical summary of FTE funded by BSEP Resources 0853 (Measure A) and 0753 (Measure E1 effective 2017-18). This does not include FTE for the program supervisor or administrative support:

| | BSEP | GF |
|-----------|-------------------|----------------|
| | Music/VAPA | Release |
| FY | FTE (a) | FTE |
| 2013-14 | 7.96 | 4.56 |
| 2014-15 | 7.83 | 2.32 |
| 2015-16 | 8.14 | 2.16 |
| 2016-17 | 7.84 | 2.32 |
| 2017-18 | 9.14 | 2.32 |
| 2018-19 | 9.05 | 2.32 |

- (3) 1% salary increase for certificated staff and a 2% salary increase for classified staff
- (4) Added Arts Anchor, Middle School Elective Supplement and After School Arts to budget after budget adoption

**BERKELEY UNIFIED SCHOOL DISTRICT
BERKELEY SCHOOLS EXCELLENCE PROGRAM (BSEP)
MUSIC , VISUAL AND PERFORMING ARTS (Measure A, Resource 0853)
Revenue and Expenditures
Comparison Report FY 2018-19**

Purpose

Six and a quarter percent (6.25%) of the available revenues generated by this measure *shall be allocated annually to providing quality instructional programs in music and the visual and performing arts for elementary and middle school students. Revenues may be used for, but are not restricted to, providing qualified teachers and staff, professional development in the arts, musical instruments and instructional materials, services and equipment necessary to conduct these programs.*

Budget Managers: Pasquale Scuderi, Associate Superintendent for Educational Services
Pete Gidlund, VAPA Program Supervisor

| | | (a) | (b) | (b)-(a) | |
|--|---|---|--|---|--|
| | Audited Actuals 2017/18 As of 6/30/18 | Adopted Budget 2018/19 As of 7/1/18 | 2nd Interim Budget 2018/19 As of 1/31/19 | Unaudited Actuals 2018/19 As of 6/30/19 | 2nd Interim Budget vs. Unaudited Actuals 2018/19 |
| REVENUE | | | | | |
| Revenue | 9,438 | 0 | 0 | 0 | 0 |
| Contribution (To)/From Measure A Reserve | 41,933 | 0 | 0 | (1,225) | (1,225) (1) |
| NET REVENUE | 51,371 | 0 | 0 | (1,225) | (1,225) |
| EXPENDITURES | | | | | |
| Certificated Salaries | 0 | 0 | 0 | 0 | 0 |
| Classified Salaries | 0 | 0 | 0 | 0 | 0 |
| Employee Benefits | 0 | 0 | 0 | 0 | 0 |
| Instructional Materials/Instruments | 1,572 | 35,000 | 35,000 | | (35,000) |
| Equipment | 0 | 65,000 | 65,000 | 63,642 | (1,358) |
| Unallocated Reserve | 0 | 0 | 0 | 0 | 0 |
| Conference/Mileage/Instructional Contracts | 172 | 0 | 0 | 0 | 0 |
| Capital Outlay | 0 | 0 | 0 | 0 | 0 |
| Indirect Costs | 104 | 5,930 | 5,930 | 3,774 | (2,156) |
| TOTAL EXPENDITURES | 1,848 | 105,930 | 105,930 | 67,416 | (38,514) |
| NET INCREASE (DECREASE) | 49,523 | (105,930) | (105,930) | (68,641) | 37,289 |
| FUND BALANCE ANALYSIS | | | | | |
| Beginning Fund Balance | 461,034 | 510,557 | 510,557 | 510,557 | 0 |
| Net Increase (Decrease) in Account Balance | 49,523 | (105,930) | (105,930) | (68,641) | 37,289 |
| Ending Account Balance | 510,557 | 404,627 | 404,627 | 441,916 | 37,289 |

Notes

(1) Contribution to the Measure A reserve Resource transferred at closing

INSTRUCTIONAL TECHNOLOGY

BSEP Measure E1, Resource 0762

BSEP Measure A, Resource 0862

ANNUAL REPORT: FY 2018-19

UPDATE: FY 2019-20

Measure E1 Purpose:

Providing instructional technology in schools, and access for students to computers and instructional technology¹

Budget Manager: Jay Nitschke, Director of Technology

Certificated Salaries & Stipends

| | | |
|-------------------------|-------------------------|----------------------------|
| <i>Budget: \$78,514</i> | <i>Actual: \$69,985</i> | <i>Variance: (\$8,529)</i> |
|-------------------------|-------------------------|----------------------------|

- | | |
|---|-----------------------|
| <ul style="list-style-type: none">• TSA for Instructional Technology• Tech Teacher Leader Stipends | 0.50 FTE ² |
|---|-----------------------|

Classified Salaries

| | | |
|--------------------------|--------------------------|--------------------------|
| <i>Budget: \$465,903</i> | <i>Actual: \$471,579</i> | <i>Variance: \$5,676</i> |
|--------------------------|--------------------------|--------------------------|

- | | |
|--|----------------------|
| <ul style="list-style-type: none">• Computer Technicians• Technology Supervisor | 6.20 FTE 0.75 FTE |
|--|----------------------|

Employee Benefits

| | | |
|--------------------------|--------------------------|-----------------------------|
| <i>Budget: \$253,487</i> | <i>Actual: \$240,414</i> | <i>Variance: (\$13,073)</i> |
|--------------------------|--------------------------|-----------------------------|

Materials, Supplies and Equipment

| | | |
|-------------------------|-------------------------|-----------------------------|
| <i>Budget: \$88,783</i> | <i>Actual: \$63,429</i> | <i>Variance: (\$25,354)</i> |
|-------------------------|-------------------------|-----------------------------|

Services and Other Operating Expenses

| | | |
|-------------------------|-------------------------|--------------------|
| <i>Budget: \$10,217</i> | <i>Actual: \$10,217</i> | <i>Variance: 0</i> |
|-------------------------|-------------------------|--------------------|

Indirect Costs

| | | |
|-------------------------|-------------------------|----------------------------|
| <i>Budget: \$53,696</i> | <i>Actual: \$50,739</i> | <i>Variance: (\$2,957)</i> |
|-------------------------|-------------------------|----------------------------|

Fund Balance

| | | |
|----------------------------|--------------------------|---------------------------|
| <i>Beginning: \$74,443</i> | <i>Ending: \$147,796</i> | <i>Increase: \$57,900</i> |
|----------------------------|--------------------------|---------------------------|

RESOURCE SUMMARY

The cost of staffing for technology requires most of the funds in the BSEP Resource, leaving the amount available for technology purchases at about \$8 per student.

¹ BSEP Measure E1, Section 3.B.iv

² Multi-funded: BSEP PD 0.5

Measure A Funds

During the 2018-19 year, funds were expended from the Measure A resource for technology (0862), which had a beginning fund balance of \$21,738. A revenue transfer from the unexpended Measure A budget from the shared allocation for technology, evaluation and professional development provided an additional \$150,000. Expenses for materials, supplies, equipment and indirect costs totalled \$171,103, eliminating the Measure A fund balance.

STATUS REPORT

Technology in the hands of teachers and students is critical to teaching and learning and meeting District instructional goals. BSEP funds are the only resource that provides schools with staff to keep technology working. Technicians' tasks include supporting students, teachers and staff by keeping computers and other technology up-to-date and operational, to help integrate technology with the curriculum, to support teachers in using Illuminate, and to help technology committees and School Site Councils make decisions about technology needs and purchases.

Until the passage of the Measure I Facilities Bond in November 2010, there were no District funds outside of BSEP for the purchase of network infrastructure and other technology. Measure I funded wifi throughout the District. Measure I currently provides \$523,000 per year through 2019-20 to improve District technology infrastructure. In the past three years, the majority of that money was used to improve wifi and short-throw projector installations.

The District working group known as DigiTech continued to meld Technology staff, Library staff, and the Instructional Tech Teachers on Special Assignment (TSAs) to focus on integrating technology into the regular school day.

In addition to Tech Department staff, the BSEP Technology budget also funds stipends for Tech Teacher Leaders (TTLs) at each school. The program began in second semester of 2014-15. One teacher from each K-8 school and a group of three from the high schools met monthly with the DigiTech team and worked at their sites to improve teachers' use of technology in classrooms.

Digitech and TTLs, in concert with Computer Techs provided by BSEP, significantly furthered the use of technology in classrooms as well as provided the means for students in the District to complete the computer-adaptive Smarter Balanced Assessments (SBA) in all 3-8 grade classrooms, and grade 11 at Berkeley High School and Berkeley Technology Academy (BTA).

With the progression of one cart per classroom becoming the norm in middle school classrooms, the elementary school norms were also put in place at middle schools:

- Schools are committing to Digital Citizenship lessons based on Common Sense Media materials
- Teachers (grade 7-8) are committing to becoming Google Certified Educators
- Teachers are agreeing to use technology for certain projects in the curriculum
- District is agreeing to provide Chromebook carts in classrooms in 4th - 8th grade, plus one for every two third grade classrooms.

BERKELEY UNIFIED SCHOOL DISTRICT
BERKELEY SCHOOLS EXCELLENCE PROGRAM (BSEP)
TECHNOLOGY (Measure E1, Resource 0762)
Revenue and Expenditures
Annual Report FY 2018/19

Purpose

Three and a quarter percent (3.25%) of the Available Revenues *shall be allocated to providing instructional technology in schools, and access for students to computers and instructional technology.*

Budget Manager: Jay Nitschke, Director of Technology

| | (a) | (b) | (b)-(a) | |
|---|---|---|---|---|
| | Adopted Budget 2018/19 As of 7/1/18 | 2nd Interim Budget 2018/19 As of 1/31/19 | Unaudited Actuals 2018/19 As of 6/30/19 | 2nd Interim Budget vs. Unaudited Actuals 2018/19 |
| REVENUE | 965,211 | 974,649 | 979,716 | 5,067 (1) |
| EXPENDITURES | | | | |
| Certificated Salaries | 76,154 | 78,514 | 69,985 | (8,529) (2) |
| Classified Salaries | 445,973 | 465,903 | 471,579 | 5,676 (2) |
| Employee Benefits | 245,606 | 253,487 | 240,414 | (13,073) (2) |
| Materials, Supplies & Equipment | 94,000 | 88,783 | 63,429 | (25,354) (3) |
| Unallocated Reserve | 28,767 | 8,596 | 0 | (8,596) |
| Services & Other Operating Expenses | 15,000 | 10,217 | 10,217 | 0 |
| Indirect Costs | 53,696 | 53,696 | 50,739 | (2,957) |
| TOTAL EXPENDITURES | 959,196 | 959,196 | 906,363 | (52,833) |
| NET INCREASE (DECREASE) | 6,015 | 15,453 | 73,353 | 57,900 |
| FUND BALANCE ANALYSIS | | | | |
| Beginning Fund Balance | 74,443 | 74,443 | 74,443 | 0 |
| Net Increase (Decrease) in Fund Balance | 6,015 | 15,453 | 73,353 | 57,900 |
| Ending Fund Balance | 80,458 | 89,896 | 147,796 | 57,900 |

Notes

- (1) Increase due to receipt of prior year and additional current year revenue in 2018-19
- (2) 1% salary increase for certificated staff and a 2% salary increase for classified staff
- (3) \$161,525 of expenditures for technology were funded with carryover from Measure A, BSEP Resource 0862

BERKELEY UNIFIED SCHOOL DISTRICT
BERKELEY SCHOOLS EXCELLENCE PROGRAM (BSEP)
TECHNOLOGY (Measure A, Resource 0862)
Revenue and Expenditures
Annual Report FY 2018-19

Purpose

Nine percent (9%) of the available revenues *shall be dedicated to providing professional development for the District's teachers and staff, to assessing the effectiveness of the District's educational programs for improving student achievement, and to providing and maintaining computers and technology in schools.*

Budget Manager: Jay Nitschke, Director of Technology

| | (a) | | | (b) | | (b)-(a) |
|---|-----------------|----------|----------|-----------------|------------------|---------|
| | 2nd | | | 2nd | | |
| | Audited | Adopted | Interim | Unaudited | Interim | |
| | Actuals | Budget | Budget | Actuals | Budget vs. | |
| | 2017/18 | 2018/19 | 2018/19 | 2018/19 | Unaudited | |
| | As of | As of | As of | As of | Actuals | |
| | 6/30/18 | 7/1/18 | 1/31/19 | 6/30/19 | 2018/19 | |
| REVENUE | | | | | | |
| Revenue | 4,892 | 0 | 0 | 0 | 0 | |
| Contribution (To)/From Measure A Reserv | 21,738 | 0 | 0 | 149,365 | 149,365 | (1) |
| TOTAL REVENUE | 26,631 | 0 | 0 | 149,365 | 149,365 | |
| EXPENDITURES | | | | | | |
| Certificated Salaries | 12,291 | 0 | 0 | 0 | 0 | |
| Classified Salaries | 0 | 0 | 0 | 0 | 0 | |
| Employee Benefits | 2,211 | 0 | 0 | 0 | 0 | |
| Materials, Supplies & Equipment | 40,255 | 0 | 0 | 161,525 | 161,525 | (2) |
| Unallocated Reserve | 0 | 0 | 0 | 0 | 0 | |
| Services & Other Operating Expenses | 0 | 0 | 0 | 0 | 0 | |
| Indirect Costs | 3,264 | 0 | 0 | 9,578 | 9,578 | |
| TOTAL EXPENDITURES | 58,021 | 0 | 0 | 171,103 | 171,103 | |
| NET INCREASE (DECREASE) | (31,390) | 0 | 0 | (21,738) | (171,103) | |
| FUND BALANCE ANALYSIS | | | | | | |
| Beginning Fund Balance | 53,128 | 21,738 | 21,738 | 21,738 | 0 | |
| Net Increase (Decrease) in Fund Balance | (31,390) | 0 | 0 | (21,738) | (21,738) | |
| Ending Fund Balance | 21,738 | 21,738 | 21,738 | 0 | (21,738) | |

Notes

- (1) The contribution is from the 9% budget in Measure A, transferring funds from Evaluation to Technology
(2) Technology equipment funded from carryover in the Measure A Resources Technology and Evaluation

EFFECTIVE STUDENT SUPPORT

BSEP Measure E1, Resources 0757, 0763, 0764

BSEP Measure A, Resource 0857

ANNUAL REPORT: FY 2018-19

UPDATE: FY 2019-20

Measure E1 Purpose

...Seven percent (7%) of the Available Revenues generated by this Measure shall be dedicated annually to providing programs designed to provide effective supports that help students reach their highest academic potential while addressing the needs of the whole child. These revenues may be allocated to programs in any district-operated school for such purposes as Counseling and Behavioral Health, Family Engagement and Access, or Student Achievement Strategies to improve academic, behavioral and social-emotional outcomes for students. ¹

Budget Manager: Pasquale Scuderi, Associate Superintendent for Educational Services

RESOURCE SUMMARY

With the restructuring of Measure E1, these student supports are united into one resource for a more coherent approach to support our students' social-emotional and academic needs. For the first year of Measure E1, the 7% allocation was allocated in percentages similar to allocations under Measure A:

| | |
|-------|----------------------------------|
| 3.50% | Student Achievement Strategies |
| 2.25% | Counseling and Behavioral Health |
| 1.25% | Family Engagement |

For 2018-19, expenditures from Measure E1 funds were:

| <u>Program</u> | <u>Resource</u> | <u>Budget</u> | <u>Actual</u> |
|----------------------------------|-----------------|---------------|---------------|
| Student Achievement Strategies | 0763 | \$995,848 | \$954,709 |
| Counseling and Behavioral Health | 0764 | \$615,718 | \$594,030 |
| Family Engagement and Access | 0757 | \$371,235 | \$349,255 |

¹ BSEP Measure E1 Section 3.A

There were savings in the Student Achievement Strategies Resource due to unfilled positions. In the Counseling and Behavioral Health Resource, savings were the result of changes in staffing and funding for counselors. The Family Engagement budget continued to rely on carryover from Measure A to support program costs.

STATUS REPORT

Middle School Counseling

School counseling is a deeply valuable component of the overall secondary school support system for students. Funds from Measure E1 continue to provide counseling services at BUSD middle schools that support academic and social/emotional concerns for students.

For 2018-19, this resource continued to provide for 4.8 FTE for middle school counselors, of whom 2.4 FTE were at King Middle School and 1.2 FTE each were at Longfellow and Willard Middle Schools. All three middle schools paid for additional counselor FTE through BSEP site funds at Willard (.15 FTE), Longfellow (.10), and King (.60); Title I site funds also contributed FTE at Willard (.65), and Longfellow (.70).

Student Achievement Strategies

Response to Intervention (RTI) staffing forms the core of the Coordination of Services Teams (COST) at both our elementary and middle schools. As one part of a multi-tiered system of supports for students, which starts with high quality classroom instruction, RTI staff regularly review student progress and are responsible for the early identification and intervention in a variety of behavioral and learning needs.

Literacy Coaches are the lead reading and writing educators at K-5 sites and are responsible for the planning, coordination, and implementation of school and district-wide literacy initiatives and curriculum. Lit Coaches support instructional planning, model effective practices, and work directly with students at each K-5 school site with pronounced reading and writing challenges.

For 2018-19, this resource continued to provide:

- 2.75 FTE elementary school RTI teachers (.25 FTE at each of the 11 elementary schools)
- 2.75 FTE middle school RTI teachers (.75 FTE for Longfellow, .75 FTE for Willard, and 1.25 FTE at King)
- 3.3 FTE elementary school Literacy Coaches/Teachers; (.3 FTE for each of the 11 elementary schools).

As part of the Student Achievement Strategy budget, \$10,000 was provided for the “Be A Scientist” program, which gives middle school students the opportunity to engage in authentic

science and engineering practices. The program is in the third year of a partnership with Community Resources for Science, serving about 700 BUSD students, every 7th grade science teacher, and involving nearly 200 mentors. The contribution from BSEP funds was matched by LCAP funds, a Chancellor's Grant, and funding from the Berkeley Public Schools Fund.

Family Engagement and Access

The [2018-19 Family Engagement program](#) will be reported in a supplemental appendix at the January 28 meeting.

Program Update 2019-20

As an outcome of the Superintendent's Budget Advisory Committee Process during 2018-19, the staffing for the Office of Family Engagement and Equity, which had been co-funded by BSEP and LCAP, was consolidated within LCAP funding for 2019-20. At the same time, Literacy Coaches, co-funded by LCAP and BSEP, were consolidated within BSEP, bringing an additional 2.2 FTE into the Student Achievement Strategies budget. In addition, funding for .5 FTE for a counselor at Berkeley Technology Academy (BTA), was added to the Counseling budget.

**BERKELEY UNIFIED SCHOOL DISTRICT
BERKELEY SCHOOLS EXCELLENCE PROGRAM (BSEP)
COUNSELING AND BEHAVIORAL HEALTH (Measure E1, Resource 0764)
Revenue and Expenditures
Comparison Report FY 2018/19**

Purpose

Seven percent (7%) of the Available Revenues generated by this Measure *shall be dedicated annually to providing programs designed to provide effective supports that help students reach their highest academic potential while addressing the needs of the whole child. These revenues may be allocated to programs in any district-operated school for such purposes as **Counseling and Behavioral Health**, Family Engagement and Access, or Student Achievement Strategies to improve academic, behavioral and social-emotional outcomes for students.*

Budget Manager: Pasquale Scuderi, Associate Superintendent, Educational Services

| | Adopted Budget 2018/19 As of 7/1/18 | 2nd Interim Budget 2018/19 As of 1/31/19 | Unaudited Actuals 2018/19 As of 6/30/19 | 2nd Interim Budget vs. Unaudited Actuals 2018/19 |
|---|--|---|--|---|
| REVENUE | 668,223 | 674,757 | 678,265 | 3,508 (1) |
| EXPENDITURES | | | | |
| Certificated Salaries | 414,408 | 414,408 | 423,328 | 8,920 (2) |
| Employee Benefits | 132,957 | 132,957 | 137,448 | 4,491 (2) |
| Unallocated Reserve | 33,885 | 33,885 | 0 | (33,885) |
| Indirect Costs | 34,468 | 34,468 | 33,254 | (1,214) |
| TOTAL EXPENDITURES | 615,718 | 615,718 | 594,030 | (21,688) |
| NET INCREASE (DECREASE) | 52,505 | 59,039 | 84,235 | 25,196 |
| FUND BALANCE ANALYSIS | | | | |
| Beginning Fund Balance | 89,857 | 89,857 | 89,857 | 0 |
| Net Increase (Decrease) in Fund Balance | 52,505 | 59,039 | 84,235 | 25,196 |
| Ending Fund Balance | 142,362 | 148,896 | 174,092 | 25,196 |

Notes

- (1) Increased due to receipt of prior year and additional current year revenue in 2018-19
- (2) This Resource funded 4.8 FTE for Middle School Counseling: 1.2 FTE each for Longfellow and Willard and 2.4 FTE for King. Overall savings were the result of changes in staffing and funding for counselors.

**BERKELEY UNIFIED SCHOOL DISTRICT
BERKELEY SCHOOLS EXCELLENCE PROGRAM (BSEP)
STUDENT ACHIEVEMENT STRATEGIES (Measure E1, Resource 0763)
Revenue and Expenditures
Comparison Report FY 2018/19**

Purpose

Seven percent (7%) of the Available Revenues generated by this Measure *shall be dedicated annually to providing programs designed to provide effective supports that help students reach their highest academic potential while addressing the needs of the whole child. These revenues may be allocated to programs in any district-operated school for such purposes as Counseling and Behavioral Health, Family Engagement and Access, or **Student Achievement Strategies** to improve academic, behavioral and social-emotional outcomes for students.*

Budget Manager: Pasquale Scuderi, Associate Superintendent, Educational Services

| | Adopted Budget 2018/19 As of 7/1/18 | 2nd Interim Budget 2018/19 As of 1/31/19 | Unaudited Actuals 2018/19 As of 6/30/19 | 2nd Interim Budget vs. Unaudited Actuals 2018/19 |
|---|--|---|--|---|
| REVENUE | 1,039,458 | 1,049,622 | 1,055,078 | 5,456 (1) |
| EXPENDITURES | | | | |
| Certificated Salaries | 664,477 | 664,477 | 693,198 | 28,721 (2) |
| Employee Benefits | 197,985 | 197,985 | 198,066 | 81 (2) |
| Unallocated Reserve | 67,638 | 67,638 | 0 | (67,638) (2) |
| Contracted Services | 10,000 | 10,000 | 10,000 | 0 |
| Indirect Costs | 55,748 | 55,748 | 53,445 | (2,303) |
| TOTAL EXPENDITURES | 995,848 | 995,848 | 954,709 | (41,139) |
| NET INCREASE (DECREASE) | 43,610 | 53,774 | 100,369 | 46,595 |
| FUND BALANCE ANALYSIS | | | | |
| Beginning Fund Balance | 99,097 | 99,097 | 99,097 | 0 |
| Net Increase (Decrease) in Fund Balance | 43,610 | 53,774 | 100,369 | 46,595 |
| Ending Fund Balance | 142,707 | 152,871 | 199,466 | 46,595 |

Notes

- (1) Increased due to receipt of prior year and additional current year revenue in 2018-19
- (2) FTE funded in 2018-19 included 5.5 FTE for RTI at the Elementary and Middle Schools and 3.3 FTE for Literacy Coaches at the Elementary Schools. \$28,802 of the unallocated budget was used to fund staff, although there were savings overall due to unfilled positions.

**FAMILY ENGAGEMENT and ACCESS
(Effective Student Support)**

BSEP Measure E1, Resource 0757

BSEP Measure A, Resource 0857

ANNUAL REPORT: FY 2018-19

UPDATE: FY 2019-20

Measure E1 Purpose

...Seven percent (7%) of the Available Revenues generated by this Measure shall be dedicated annually to provide programs designed to provide effective supports that help students reach their highest academic potential while addressing the needs of the whole child. These revenues may be allocated to programs in any district-operated school for such purposes as Counseling and Behavioral Health, Family Engagement and Access, or Student Achievement Strategies to improve academic, behavioral and social-emotional outcomes for students. ¹

**Budget Managers: James Wogan, Manager of Student Services
Ann Callegari, Supervisor of Family Engagement & Equity**

Staff

| | | |
|--------------------------|--------------------------|------------------------|
| <i>Budget: \$220,911</i> | <i>Actual: \$221,157</i> | <i>Variance: \$246</i> |
|--------------------------|--------------------------|------------------------|

- | | |
|--|----------|
| ● Family Engagement Specialists | 2.00 FTE |
| ● High School Family Engagement Specialist | .27 FTE |
| ● Supervisor of Family Engagement | 1.00 FTE |

Employee Benefits

| | | |
|--------------------------|-------------------------|----------------------------|
| <i>Budget: \$100,160</i> | <i>Actual: \$95,931</i> | <i>Variance: (\$4,229)</i> |
|--------------------------|-------------------------|----------------------------|

Books, Supplies and Equipment

| | | |
|------------------------|------------------------|------------------------|
| <i>Budget: \$3,700</i> | <i>Actual: \$4,152</i> | <i>Variance: \$452</i> |
|------------------------|------------------------|------------------------|

Services and Other Operating Expenses

| | | |
|-------------------------|------------------------|---------------------------|
| <i>Budget: \$15,300</i> | <i>Actual: \$8,464</i> | <i>Variance (\$6,836)</i> |
|-------------------------|------------------------|---------------------------|

Indirect Costs

| | | |
|-------------------------|-------------------------|----------------------------|
| <i>Budget: \$20,782</i> | <i>Actual: \$19,551</i> | <i>Variance: (\$1,231)</i> |
|-------------------------|-------------------------|----------------------------|

Fund Balance

| | | |
|----------------------------|-------------------------|--------------------------|
| <i>Beginning: \$20,081</i> | <i>Ending: \$47,640</i> | <i>Change : \$23,929</i> |
|----------------------------|-------------------------|--------------------------|

¹ BSEP Measure E1 Section 3.A

RESOURCE SUMMARY

The expenditures in this BSEP resource were essentially as expected. Approximately one third of the travel and conference expense was used because the national family engagement conference was out of state. This year we expect to use the budgeted amount because this conference is in Los Angeles, and members of the OFEE team will be able to attend.

Measure A Resource 0857

Support for this program continued to draw upon a dwindling fund balance from the prior BSEP Measure A to sustain the current staffing level by funding .6 FTE, with the remainder of the funding for this program provided through LCAP supplemental funds.

STATUS REPORT

Activities in 2018-19 included:

- OFEE staff presented a family engagement model to support families who are at different stages of parenting and parent leadership at the AAREA (African American Regional Educational Alliance).
- K to College School Supply and Dental Hygiene Giveaway (over 1200 bags were provided to BUSD low-income families).
- *Why 9th Grade Matters* to welcome and help new 9th grade students and parents with accessing resources and support at the High School,
- BUSD's 2nd annual Black History Oratorical Fest took place on March 26, 2019. K-12 students participated in this district-wide event. The purpose of this event was to promote equity through knowledge and facilitate ELA goals. Students, families and staff were immersed in Black history as students prepared to compete. The climate at each school event was invigorating, welcoming, respectful and engaging.
- OFEE district-wide conference on April 27, 2019. Professional and parent facilitators led meaningful workshops to support parents by creating partnerships with schools, and skills to navigate their children's learning.
- College Readiness and Financial Aid workshops.
- Educational Partnership Workshop Series in April 2019 offered parents strategies to support children at home and in programs during the summer. Planning for the following school year, and strategies around partnering with schools for student success were also a focus.
- BUSD Cesar Chavez and Dolores Huerta Visual Arts and Essay Contest and Celebration May 2019.
- Warm Passes - Middle School and High School transition meetings for seamless transitions for our most vulnerable students and families.
- Promotional Ceremony for English Learners – Family Engagement supports with programming, outreach and day of the event.

- Educate and support families of students with IEPs (Individual Educational Plan for special education students) or 504 (Child Education Accommodation) plans.
 - Immigration support for families in the form of advocacy workshops, legal resources and communicating with school staff.
 - Food Pantries at all elementary schools, middle schools, BTA, and BHS.
 - Ongoing partnership with McKinney-Vento Coordinator to support homeless families with food, clothing, housing, student enrollment, and communicating / advocating for these students and families with school staff and community organizations.
-

Update FY 2019-20

As an outcome of the Superintendent's Budget Advisory Committee process during 2018-19, funding for staff for the Office of Family Engagement and Equity was moved to LCAP for 2019-20. With LCAP providing funding for OFEE staff, the BSEP Measure A resource for Family Engagement is now supporting non-staffing needs such as materials, supplies, contracts, and hourly work.

**BERKELEY UNIFIED SCHOOL DISTRICT
BERKELEY SCHOOLS EXCELLENCE PROGRAM (BSEP)
FAMILY ENGAGEMENT AND ACCESS (Measure E1, Resource 0757)
Revenue and Expenditures
Comparison Report FY 2018/19**

Purpose

Seven percent (7%) of the Available Revenues generated by this Measure *shall be dedicated annually to providing programs designed to provide effective supports that help students reach their highest academic potential while addressing the needs of the whole child. These revenues may be allocated to programs in any district-operated school for such purposes as Counseling and Behavioral Health, Family Engagement and Access, or Student Achievement Strategies to improve academic, behavioral and social-emotional outcomes for students.*

Budget Manager: Ann-Marie Callegari, Supervisor of Family Engagement and Equity

| | Adopted Budget 2018/19 As of 7/1/18 | 2nd Interim Budget 2018/19 As of 1/31/19 | Unaudited Actuals 2018/19 As of 6/30/19 | 2nd Interim Budget vs. Unaudited Actuals 2018/19 |
|---|--|---|--|---|
| REVENUE | 371,235 | 374,865 | 376,814 | 1,949 (1) |
| EXPENDITURES | | | | |
| Classified Staff | 220,911 | 220,911 | 221,157 | 246 |
| Employee Benefits | 100,160 | 100,160 | 95,931 | (4,229) |
| Books & Supplies | 4,000 | 3,700 | 4,152 | 452 |
| Equipment | 0 | 0 | 0 | 0 |
| Unallocated Reserve | 10,382 | 10,382 | 0 | (10,382) |
| Services & Other Operating Expenses | 15,000 | 15,300 | 8,464 | (6,836) |
| Indirect Costs | 20,782 | 20,782 | 19,551 | (1,231) |
| TOTAL EXPENDITURES | 371,235 | 371,235 | 349,255 | (21,980) |
| NET INCREASE (DECREASE) | 0 | 3,630 | 27,559 | 23,929 |
| FUND BALANCE ANALYSIS | | | | |
| Beginning Fund Balance | 20,081 | 20,081 | 20,081 | 0 |
| Net Increase (Decrease) in Fund Balance | 0 | 3,630 | 27,559 | 23,929 |
| Ending Fund Balance | 20,081 | 23,711 | 47,640 | 23,929 |

(1) Increased due to receipt of prior year and additional current year revenue in 2018-19

BERKELEY UNIFIED SCHOOL DISTRICT
BERKELEY SCHOOLS EXCELLENCE PROGRAM (BSEP)
PARENT OUTREACH (Measure A, Resource 0857)
Revenue and Expenditures
Comparison Report FY 2018/19

Purpose

One and a quarter percent (1.25%) of the revenues dedicated to the Programs to Enhance Student Learning *shall be allocated annually for a variety of services to support the families of Berkeley's public school students by providing parent education and promoting greater parent involvement in their children's education.*

Budget Manager: Ann-Marie Callegari, Supervisor of Family Engagement and Equity

| | Audited Actuals 2017/18 As of 6/30/18 | Adopted Budget 2018/19 As of 7/1/18 | 2nd Interim Budget 2018/19 As of 1/31/19 | Unaudited Actuals 2018/19 As of 6/30/19 | 2nd Interim Budget vs. Unaudited Actuals 2018/19 |
|--|--|--|---|--|---|
| REVENUE | | | | | |
| Revenue | 10,274 | 0 | 0 | | 0 |
| Contribution (To)/From Measure A Reserve | 0 | 0 | 0 | (245) | (245) (1) |
| NET REVENUE | 10,274 | 0 | 0 | (245) | (245) |
| EXPENDITURES | | | | | |
| Classified Staff | 30,557 | 34,410 | 34,410 | 33,899 | (511) |
| Employee Benefits | 17,046 | 19,673 | 19,673 | 18,802 | (871) |
| Books & Supplies | 0 | 0 | 0 | 0 | 0 |
| Equipment | 0 | 0 | 0 | 0 | 0 |
| Unallocated Reserve | 0 | 1,517 | 1,517 | 0 | (1,517) |
| Services & Other Operating Expenses | 689 | 0 | 0 | 0 | 0 |
| Indirect Costs | 2,878 | 3,297 | 3,297 | 3,125 | (172) |
| TOTAL EXPENDITURES | 51,169 | 58,897 | 58,897 | 55,826 | (3,071) |
| NET INCREASE (DECREASE) | (40,895) | (58,897) | (58,897) | (56,071) | 2,826 |
| FUND BALANCE ANALYSIS | | | | | |
| Beginning Fund Balance | 190,657 | 149,762 | 149,762 | 149,762 | 0 |
| Net Increase (Decrease) in Fund Balance | (40,895) | (58,897) | (58,897) | (56,071) | 2,826 |
| Ending Fund Balance | 149,762 | 90,865 | 90,865 | 93,691 | 2,826 |

Notes

(1) Contribution to the Measure A reserve Resource transferred at closing

COMMUNITY ENGAGEMENT & PUBLIC INFORMATION

BSEP Measure E1, Resource 0754

BSEP Measure A, Resource 0854

ANNUAL REPORT: FY 2018-19

PROGRAM UPDATE: FY 2019-20

Measure E1 Purpose

Support of the Planning and Oversight Committee and School Site Councils, and for community engagement, communications and public information services.¹

Budget Manager: **Natasha Beery, Director of BSEP and Community Relations**

Classified Salaries

Budget: \$354,113

Actual: \$341,066

Variance: (\$13,047)

- Director of BSEP and Community Relations 1.00 FTE
- BSEP Program Specialist 1.00 FTE
- Public Information Officer 0.85 FTE
- Specialist, Translation and Interpretation 0.67 FTE

In addition to salaried positions, hourly staff continued to provide P&O meeting support (set-up, minutes) and some additional translation services. Additional hourly support was required during a period of transition in the BSEP Program Specialist position.

Employee Benefits

Budget: \$138,252

Actual: \$130,287

Variance: \$(\$7,965)

Contracted Services*

Budget: \$83,030

Actual: \$58,015

Variance: (\$25,015)

Equipment and Supplies

Budget: \$12,000

Actual: \$3,373

Variance: (\$8,627)

Fund Balance

Beginning: \$25,858

Ending: \$108,323

Increase: \$63,641

**Contracted services include printing, mailing, online and hourly translation, web and graphic design, special projects, professional memberships and conferences.*

RESOURCE SUMMARY:

Under the prior BSEP Measure A, staffing and programs were supported in part by deficit spending made possible through the savings that accrued during a period of staffing transition. While Measure E1 has provided some additional revenues, a reduction in expenditures was

¹ BSEP Measure E1 Section 9A

needed for a more sustainable structure for the long term. Equipment purchases were deferred and some contracted work was co-funded with the General Fund to support the Superintendent's Speaker Series.

Measure A Funds

Carryover funds from BSEP Measure A remain and may be drawn upon for special projects, including resource materials, equipment, contracts, website updates, and other deferred needs. For 2018-19, funds were expended as planned to replace equipment used for simultaneous interpretation at District events. In the area of contracts, funds had been set aside in support of website updates, as well as for the Office of Family Engagement and Equity's plans for Community Partnership Workshops on LCAP and the 2020 Vision, and a Family Resource Guide. The website updates took place, but the workshops and guide did not. However, a Superintendent's Speaker Series on Equity, partly funded through a Chancellor's Grant, was supported through these funds for printing and advertising and event support.

STATUS REPORT

The BSEP Director and/or Program Specialist supported the following core BSEP functions in 2018-19:

- Worked with every school Principal and School Site Council (SSC) to analyze and develop all 18 BSEP Site Program Fund budgets and plans;
- Supported each Principal in conducting SSC elections in September and the appointment of P&O Representatives from each school site in October;
- Organized the School and District Committee Orientation Workshops in October, and Orientation for new P&O Representatives in November
- Produced Site Committee Handbook with budget information for each site; Produce Annual Plan binders for P&O Committees;
- Prepared the annual SSC Elections, Diversity, and Activity Report for the Board in December;
- Provided outreach and information about BSEP at community events such as the Solano Stroll and Kindergarten Fair;
- Planned and co-facilitated 13 P&O Committee meetings, providing documents, coordinating guest speakers, and preparing agendas and presentations;
- Visited SSC meetings at 17 of the 19 schools and programs (including TK), collecting best practices and providing guidance and support to principals and committee members.
- Together with the Associate Superintendent and/or Program Managers, prepared the Annual Reports and First Interim Reports for each of the 9 BSEP Resources;
- Together with the Associate Superintendent and/or Program Managers, developed the Annual Plans for the 9 BSEP Resources, including expenditures of prior measure carryover;

- Together with Educational Services and Principals, prepared the Consolidated School Plans for all 18 school sites and programs for signature and for Board;
- Advised and prepared documents and presentations for 7 Superintendent's Budget Advisory Committee (SBAC) meetings and 8 Board meetings;
- Implemented and monitored the operational and technical tasks for the 9 BSEP Resources and 18 sites, working alongside the Senior Budget Analyst to ensure careful oversight of fund expenditures.

District Communications and Community Relations

The BSEP Director convened the Communications Team on a weekly basis to ensure continued improvement in communications with families, staff and the wider Berkeley community. The Team includes the Public Information Officer, the Superintendent's Executive Assistant, the Technology Director and a Communications Consultant, with participation from the District Translator/Interpreter and Supervisor of Family Engagement of Equity. The Team also makes strategic use of contractors for some content, translation, printing, and mailing services.

In FY 2018-19, strategic communications work was required for issues that affected our students and staff on the local, regional and national level, including:

- Sylvia Mendez Elementary School Renaming Celebration
- [Superintendent's Speaker Series on Equity and Excellence](#)
 - Dr. Frank Worrell, Dr. Prudence Carter, Dr. Jabari Mahiri, Richard Rothstein
- November 2018 wildfires and related Air Quality issues
- May 22 Sacramento Rally and school staffing repercussions
- BHS Opening of CTE Carpentry and Design Space
- Nutrition Services communications regarding free and reduced lunch
- Communications Best Practices for Managers and Principals
- Sustainability Plan messaging
- Facilities Master Plan publicity
- School Supplies Giveaway publicity
- BTA Brochure
- Communications to staff about rules for public employees and political campaigns
- African-American Studies 50th Anniversary
- 50th Anniversary of BUSD's busing plan for integration
- College and Career Week
- Superintendent's Budget Advisory Committee and budget cuts messaging
- Black History Oratorical Fest
- BHS Graduation relocation from Greek Theater to UC Haas Pavilion
- Parent-Student Handbook
- Superintendent Messages
- Superintendent Site and Department Visits
- African-American Success Project video
- Superintendent Evans Retirement
- Superintendent Search and Hiring

Professional Development: Members of the Communications Team’s professional development included attending the EdTrust West Educational Equity Forum, participating in the Alameda County Office of Education PIO Network, the Alameda County Emergency Operations, Center, the East Bay PIO Network, and the California Public Relations Association (CalSPRA). Director Natasha Beery was a selected presenter at the CalSPRA Annual Conference and presented the BUSD experience of successfully renaming LeConte/Sylvia Mendez Elementary School.

Communications Channels: In order to reach our varied audiences in BUSD and meet their diverse communication needs, a combination of media tools and channels were employed, including: our website, homepage blog posts, school and community postings/flyers, letters to families, online surveys, emails from School Messenger and via e-trees, phone blasts, school newsletters, and community forums and events.

The *A+ News*, produced in both English and Spanish, is the primary communication tool for keeping families and community apprised of the events, programs, services, and new initiatives in Berkeley public schools through direct subscriber email delivery and website access. The *A+ News* is sent electronically every two weeks to over 18,000 community members, as well as 2500 staff members.

The *Community Report* is a four-page document that was produced and mailed to 46,000 residential addresses in Berkeley in December. It is also distributed at schools and at public events, and is available online in both English and Spanish. The 2018-19 edition provided an update on the BUSD budget, the California Dashboard, CTE Pathway, Bond-funded Facilities improvements, and the 50th Anniversary of BUSD’s busing plan for integration.

Public Information Officer

The Public Information Officer (PIO) is responsible for reporting on district-wide events and responding to public inquiries. The position is partly funded by the General Fund (13%) to reflect the compliance aspects of the work with Public Records. PIO work in 2018-19 included:

- Compiled and distributed by email 39 editions of Staff Weekly Bulletins with mini-reports on a wide variety of Board actions and activities and programs across the District.
- Managed the District’s responses to 57 Public Record Act requests on a wide range of topics.
- Responded to multiple media inquiries on a range of topics, including questions about Senator Kamala Harris’s experiences as a child in the Berkeley Schools, environmental concerns at Malcolm X school, and the May 22 statewide Day of Action in Sacramento.
- Responded to information and access requests from community members, and local organizations.
- Attended Board meetings, assisted with staff presentations, documented presentations, and worked with Berkeley Community Media and the Technology Director to ensure YouTube streaming of Board Meetings.
- Provided community outreach related to Facilities and Maintenance Projects, including project and meeting postings.
- Served as a member of the Communications Team and the Superintendent’s Cabinet.

- Drafted communications for multiple departments.
- Coordinated the annual publication of the School Accountability Report Card (SARC) for each school.
- Participated in an East Bay PIO network to meet and share best practices
- Tracked and maintained a log of media reports on BUSD-related news
- Managed outside requests for flyer distribution in the schools
- Coordinated proposals and review boards and inquiries for art installations and murals at school sites including Thousand Oaks School, Washington and Sylvia Mendez.
- Served as liaison for annual Liberty Hill Baptist Church Outstanding Educator awards

Translation and Interpretation

The full-time Translation and Interpretation Specialist position is co-funded with the General Fund (33%), reflecting the time spent in compliance work such as translating IEP's. In 2018-19, the Translation Specialist provided Spanish translation and interpretation to support District-wide and school site-specific communications, including:

Translation of Documents:

- | | |
|--|--|
| ● <i>A+ Newsletter</i> (every two weeks) | ● Ninth Grade Information Night |
| ● Community Reports | ● Superintendent Search |
| ● Welcoming letters and messages from Superintendent | ● Suspension and Expulsion Due Process |
| ● Student Services Forms and Letters | ● Statewide Day of Action Letters and Messages to Families |
| ● BSEP Documents and PowerPoints | ● Changes to School Calendar |
| ● Board Policies | ● Summer Meals and Meal Charges |
| ● LCAP Executive Summary | ● Oratorical Festival |
| ● IEP Documents (14+) | ● BHS Letters to U9 Families |
| ● Educational Services Documents | ● BHS Resources |
| ● Mathematical Practices | ● STAR Testing |
| ● Letters for REALM | ● State of the District |
| ● Community Forums | ● Budget Cuts |
| ● Office of Family Engagement and Equity Documents | ● Parent letters Illuminate |
| ● Cooking and Gardening Program Flyers, Brochures | ● Sexual Harassment |
| ● BUSD Food Policy | ● McKinney -Vento |
| ● Air Quality Messages | ● Non Discrimination Policy |
| ● Complaint Response Letters | ● K-to-College Letters |

Simultaneous Interpretation:

- Interpretation for community forums and workshops
- Reclassification Ceremony
- Recording of telephone blasts from Superintendent's Office and Educational Services
- Interpretation for Student Services for Latino families and SARBS
- Interpretation Longfellow Parent-Student Workshops
- Interpretation Parent-Teacher Conferences

Two Arabic interpreters were available to assist with parent-staff meetings such as conferences and IEPs and document translation. Contracted interpretation services are available via the Language Line, a telephone-based service providing simultaneous translation. Hourly on-call interpreters have provided interpretation for parent teacher conferences, IEPs, and other student support services in Spanish (892 minutes), Japanese (486 minutes), Arabic (362 minutes), French (220 minutes), Cantonese (141 minutes), Dari (118 minutes), Urdu (114 minutes), Mandarin (86 minutes), Vietnamese (37 minutes), Wolof and Amharic (30 minutes each), and one 4 minute call in Italian.

Program Update FY 2019-20

With the retirement of PIO Charles Burrell in early August, and the departure of long-time Communications Consultant Lea Baechler-Brabo in early July, the Communications Team saw significant turnover right at the time that a new Superintendent was also coming on board in July 2019. Fortunately, a skilled new PIO, Trish McDermott, was brought on board in late September, and an hourly communications consultant, Haldun Morgan joined the team in late October. During this transition time, it has been necessary to scale back the frequency of the Weekly Bulletin to every other week, and to postpone the production of the A+ News in order to give the new team time for professional development and place focus on pressing needs, including producing the Community Report in time to go to print in December.

In 2019, the Superintendent's Budget Advisory Committee recommended that BSEP carryover and one-time funding take on additional FTE and programs previously funded by the General Fund. It is anticipated that both Measure A carryover funds and ongoing Measure E1 funds again be on the table to address District needs that cannot be supported through State revenues.

Further, the insufficiency of State funding has led to the development of a proposal for a new special local tax that will be on the March 2020 ballot to bring additional revenue to address educator recruitment and retention. Should that measure pass, the BSEP Office and the P&O Committee could be involved in the oversight of those funds beginning in 2020-21.

Meanwhile, the BSEP Director, Program Specialist and Budget Analyst are working to support the new Superintendent, new Associate Superintendent for Educational Services, a new Library Coordinator and three new Principals as they take on their new roles in BUSD, including their oversight and involvement with BSEP resources and site budgets.

**BERKELEY UNIFIED SCHOOL DISTRICT
BERKELEY SCHOOLS EXCELLENCE PROGRAM (BSEP)
PUBLIC INFORMATION , TRANSLATION,
P&O COMMITTEE SUPPORT (Measure E1, Resource 0754)
Revenue and Expenditures
Annual Report FY 2018-19**

Purpose

Support of the Planning and Oversight Committee and School Site Councils, and for community engagement, communications and public information services.

Budget Manager: Donald Evans, Superintendent

Natasha Beery, Director of BSEP and Community Relations

| | (a) | (b) | (b)-(a) | |
|---|----------------|----------------|----------------|------------------|
| | 2nd | 2nd | 2nd | |
| | Adopted | Interim | Unaudited | Interim |
| | Budget | Budget | Actuals | Budget |
| | 2018/19 | 2018/19 | 2018/19 | vs. |
| | As of | As of | As of | Unaudited |
| | 7/1/18 | 1/31/19 | 6/30/19 | Actuals |
| | | | | 2018/19 |
| REVENUE | | | | |
| Revenue | 606,098 | 612,024 | 615,206 | 3,182 (1) |
| EXPENDITURES | | | | |
| Classified Salaries | 357,825 | 354,113 | 341,066 | (13,047) (2) (3) |
| Employee Benefits | 137,563 | 138,252 | 130,287 | (7,965) (2) (3) |
| Materials and Supplies | 12,000 | 12,000 | 3,373 | (8,627) |
| Unallocated Reserve | 2,812 | 5,805 | 0 | (5,805) |
| Equipment | 0 | 0 | 0 | 0 |
| Contracted Services | 83,000 | 83,030 | 58,015 | (25,015) |
| TOTAL EXPENDITURES | 593,200 | 593,200 | 532,741 | (60,459) |
| NET INCREASE (DECREASE) | 12,898 | 18,824 | 82,465 | 63,641 |
| FUND BALANCE ANALYSIS | | | | |
| Beginning Fund Balance | 25,858 | 25,858 | 25,858 | 0 |
| Net Increase (Decrease) in Fund Balance | 12,898 | 18,824 | 82,465 | 63,641 |
| Ending Fund Balance | 38,756 | 44,682 | 108,323 | 63,641 |

(1) Increase due to receipt of prior year and additional current year revenue in 2018-19

(2) 2% salary increase for classified staff. Savings from hourly budgets.

(3) FTE for District Translator and Public Information Officer positions reallocated between BSEP and General Fund

**BERKELEY UNIFIED SCHOOL DISTRICT
BERKELEY SCHOOLS EXCELLENCE PROGRAM (BSEP)
PUBLIC INFORMATION , TRANSLATION,
P&O COMMITTEE SUPPORT (Measure A, Resource 0854)
Revenue and Expenditures
Annual Report FY 2018-19**

Purpose

Two percent (2%) of the revenues from this measure shall be utilized *for public information, translation services for District families and support of the Planning and Oversight Committee.*

Budget Manager: Donald Evans, Superintendent

Natasha Beery, Director of BSEP and Community Relations

| | | | (a) | (b) | (b)-(a) |
|--|---------|-----------|-----------|-----------|-----------|
| | | | 2nd | | 2nd |
| | Audited | Adopted | Interim | Unaudited | Interim |
| | Actuals | Budget | Budget | Actuals | Budget |
| | 2017/18 | 2018/19 | 2018/19 | 2018/19 | vs. |
| | As of | As of | As of | As of | Unaudited |
| | 6/30/18 | 7/1/19 | 1/31/19 | 6/30/19 | Actuals |
| | | | | | 2018/19 |
| REVENUE | | | | | |
| Revenue | 3,082 | 0 | 0 | 0 | 0 |
| Contribution (To)/From Measure A Reserve | 13,693 | 0 | 0 | (400) | (400) (1) |
| TOTAL REVENUE | 16,775 | 0 | 0 | (400) | (400) |
| EXPENDITURES | | | | | |
| Classified Salaries | 0 | 0 | 0 | 0 | 0 |
| Employee Benefits | 0 | 0 | 0 | 0 | 0 |
| Materials and Supplies | 0 | 0 | 0 | 0 | 0 |
| Unallocated Reserve | 0 | 10,000 | 888 | 0 | (888) |
| Equipment | 0 | | 9,112 | 8,340 | (772) |
| Contracted Services | 63 | 95,000 | 95,000 | 15,401 | (79,599) |
| TOTAL EXPENDITURES | 63 | 105,000 | 105,000 | 23,741 | (81,259) |
| NET INCREASE (DECREASE) | 16,712 | (105,000) | (105,000) | (24,141) | 80,859 |
| FUND BALANCE ANALYSIS | | | | | |
| Beginning Fund Balance | 274,328 | 291,040 | 291,040 | 291,040 | 0 |
| Net Increase (Decrease) in Fund Balance | 16,712 | (105,000) | (105,000) | (24,141) | 80,859 |
| Ending Fund Balance | 291,040 | 186,040 | 186,040 | 266,899 | 80,859 |