

BERKELEY UNIFIED SCHOOL DISTRICT

TO: BSEP Planning and Oversight Committee
FROM: Pasquale Scuderi, Associate Superintendent for Educational Services
DATE: February 27, 2018
SUBJECT: Recommendation for Expenditure of BSEP Funds for Class Size Reduction and Support for Teaching in FY 2018-19

BACKGROUND INFORMATION

According to Measure E1 of 2016, “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.”¹

The goal of class size reduction has been a major component of every BSEP measure since 1986. Earlier BSEP measures set class size goals of around 26:1 for the elementary schools; under BSEP Measure A of 2006, the goal was a district-wide average class of 26:1 for the elementary school grades, with a further reduction to 20:1 at K-3 to qualify for the State of California program which rewarded districts for achieving that goal.

In 2013-14 the State changed class size reduction targets to 24:1 school-wide for K-3, which occasioned a reexamination of the elementary class size configuration in the BUSD. The 20:1 goal at K-3 made the transition to 26:1 at 4th grade mathematically challenging in schools with fewer sections, yielding either large classes or mixed grade classes.

With BSEP Measure E1, beginning in FY 2017-18, the District-operated elementary school average class sizes are being gradually adjusted, with the aim of achieving balanced class sizes in all elementary schools with school-wide K-5 averages of 23:1 achievable by the sixth year of the measure. This exceeds the State goal of 24:1 at K-3. The BSEP class size goals for grades 6-12 remain at district-wide averages of 28:1 and 18:1 for the continuation high school.

Class Size Reduction and the Teacher Template

The contribution of BSEP Class Size Reduction (CSR) Funds for classroom teachers is estimated using a planning tool known as the “Teacher Template” (*Appendix A*). 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 staffing to be paid for by BSEP funds, to determine the

¹ BSEP Measure E1 of 2016, Section 3.A

total number of teacher staffing, expressed as Full Time Equivalent (FTE).

This recommendation includes the following assumptions, which reflect the Measure E1 goal of gradually rebalancing of elementary class sizes toward a school-wide average of 23, as well as the adjustment in release time in elementary school toward parity 1st-5th.

34:1	<u>General Fund Staffing Ratio for Elementary</u>
22.4:1	BSEP Measure E1 Staffing Ratio for K
22.65:1	BSEP Measure E1 Staffing Ratio for 1st
20:1	BSEP Measure A prior Staffing Ratio for 2nd-3rd
26:1	BSEP Measure A prior Staffing Ratio for 4th-5th
36:1	<u>General Fund Staffing Ratio for Secondary</u>
28:1	BSEP Measure A/E1 Staffing Ratio for Secondary
18:1	BSEP Staffing Ratio for TK, Special Day Class and BTA
0.16 FTE	Release Time FTE for 1st-5th grades
0.20 FTE	Release Time FTE for 6th grade

Using these assumptions, and with a projected TK-12 enrollment of **9,530** the staffing formula results in a total of:

452.04 FTE	Classroom teachers needed, of which:
134.64 FTE	Provided through BSEP CSR (approximately 30% of all classroom FTE) ² .

In order to calculate the costs to BSEP, the following assumptions are used:

\$101,441	Average teacher compensation (salary and employer-paid fringe benefits) ³⁴
\$1,878	Average substitute teacher compensation
\$2,870	Direct Support = costs associated with maintaining additional classrooms ⁵
5.93%	Indirect Costs = operational costs

Altogether, to meet these targeted class size reduction goals, the expense to the BSEP Class Size Reduction fund in 2018-19 is projected to be **\$14,297,200**. This is an increase of \$391,200 from the prior year plan (about 2.8%).

It should be noted that enrollment projections are reviewed both prior to presentation of the budget to the Board for adoption in June, and again in early September after the actual enrollment has stabilized. The actual expense

² This is an increase of 4.84 FTE from **129.80 FTE** in the 2017-18 plan.

³ A decrease of \$958 from **\$102,399** in the 2017-18 plan

⁴ The State Teachers Retirement System (STRS) contribution increased from 14.43% to **16.28%**

⁵ Under the terms of Measure E1, the revenues dedicated to class size reduction purposes may be spent for all costs attendant to them, including operational costs, and other costs associated with the opening or maintaining of classrooms to reduce class sizes.

for the BSEP transfer to the General Fund for classroom teachers is calculated at the close of the Fiscal Year.

Recognizing the need for teachers in “hard to fill” areas such as in science, math and special education and a shortage of teachers of color, Berkeley Unified is moving up the timeline for its hiring process to recruit and retain qualified employees for our schools. In order to accelerate the process of hiring, the P&O is provided with the Teacher Template for its review and approval at this time.

PROGRAM SUMMARY - Support for Teaching

In addition to the Class Size Reduction goal, which is achieved through the aforementioned transfer of funds from BSEP to the General Fund, this resource supports a number of expenses in support of high quality instruction, as permitted by the Measure. These expenses, under the rubric of “Support for Teaching”, may include Professional Development, Program Evaluation, Expanded Course Offerings, and Classroom Support. Unlike the “teacher transfer” which is calculated at the end of the year, these expenses are “directly charged” at the time that the actual costs for the programs are incurred.

Full plans for these purposes in 2018-19 will be presented to the P&O Committee on March 13, 2018. Preliminary costs are shown on the Class Size Planning Document, but will be updated and refined before P&O approval. As a preliminary draft, these programs would include:

Professional Development (PD)

Increases in expenditures in this area are partly driven by the need to relieve the General Fund (GF) of costs as part of the \$1.8 million cut target to sustain the central budget. Additional FTE would be provided by BSEP to round out the Professional Development Coordinator position, fund more of the PD Teacher Leaders at BHS, and fund Instructional Technology TSA at BHS; these positions had been carried in whole or in part by the General Fund, but are within the scope and capacity of this BSEP resource to carry going forward.

- 1.0 FTE PD Coordinator - *was 0.40 in BSEP; 0.60 was GF*
- 4.4 FTE PD Teacher Leaders BHS - *was 2.0 in BSEP; 2.4 was in GF*
- 1.00 FTE Instructional Technology TSA at BHS - *had been GF position*
- 2.75 FTE Elementary Literacy Coaches
- 0.60 FTE K-5 Lead Literacy Coach
- 0.50 FTE K-12 Instructional Technology TSA
- \$90,000 PD Workshops
- \$60,000 K-8 Teacher Leader Stipends
- \$50,000 Teacher-Initiated Professional Development

Program Evaluation

Adjustments in expenditures in this area for 2018-19 are again partly driven by the need to relieve the General Fund (GF) of costs, as part of the \$1.8 million cut target to sustain the central budget. With increases in the Professional Development area of the BSEP resources, some adjustments are being made in this budget. The Director of BREA position would be eliminated, and the Associate Superintendent would carry the responsibility for oversight of this department, with some additional staffing from Teachers on Special Assignment as this department transitions to a different oversight model. There would also be reduction in some of the discretionary expenditures for stipends and workshops of about \$36,500.

- 2.8 FTE Teachers on Special Assignment (*increase from 1.8 FTE*)
- 1.0 FTE Evaluation and Assessment Analyst
- 0.50 FTE Administrative Support
- \$55,000 Contracted Services (Illuminate and other software)
- \$18,000 Supplies, Equipment

Expanded Course Offerings (ECO)

This funding provides Middle and High School students with a wide variety of options for before and after-school elective and enrichment classes that are not available within the master schedule. For example, ECO classes at Berkeley High include Advanced Placement (AP) augmentation classes, providing access to AP coursework for students who might not otherwise have such access, as well as science labs, yearbook and music classes. The 2018-19 proposal would be based on 7.6 FTE, the same allocation as in 2017-18.

- 0.4 FTE Longfellow Middle School
- 0.4 FTE Willard Middle School
- 0.8 FTE King Middle School
- 6.0 FTE Berkeley High School

Classroom Support

This resource may provide additional FTE for school sites or programs in need of support beyond that provided through the Teacher Template calculation. In 2017-18, this resource supported 2.0 FTE at Berkeley Technology Academy and 0.6 FTE at LeConte. With the reorganization of BTA, the 2.0 FTE is no longer necessary, while with the inception of the new Universal 9th Grade program at BHS, additional FTE is needed to provide support for the program in order to provide more individualized attention as the students transition into high school. BSEP would carry 2.0 FTE of the needed 5.6 FTE, with the remainder provided by the General Fund and LCAP funding.

- 2.0 FTE Universal 9th Grade at BHS
- 0.6 FTE LeConte Elementary School - TWI Support