

GUIDE TO READING THE ANNUAL REPORT

The Annual Report is organized to clearly display how the expenditures relate to the purposes of BSEP Measure A of 2006.¹ Revenue is allocated to each of the purposes in accordance with the percentages specified in the measure, in separate and distinctly coded **Resources**.

Overview and Status Report

Each Resource is introduced with a one to two page **Overview** of revenue and expenditures, including salaries, benefits, supplies and other operating expenses. This brief narrative also compares the budget with actual expenditures, and explains significant variances. The overview is followed by a brief status report, providing detail on the on the projects funded by each BSEP Resource.

Revenue and Expenditures Comparison Report

Following the overview of each Resource is a **Comparison Report** which shows actual expenditures from FY 2015-16 next to the FY 2016-17 Adopted budget, Second Interim budget (revised as of January 31, 2017), the (Unaudited) Actuals as of June 30, 2017, and the variance between the Second Interim budget and actuals. This comparison report also shows a Fund Balance Analysis.

Budget, First Interim, Second Interim, and Unaudited Actuals (Closing)

Revenue is projected in February for the following fiscal year, with budget allocations initially distributed to each of the Purposes of the Measure in the percentages delineated in the BSEP Measure. Since the District receives tax revenue at various points throughout the fiscal year, First and Second Interim budgets (at October 31 and January 31 respectively) provide the opportunity to revise budgets. At the fiscal “closing” of the year on June 30, actual net revenue is recognized, and distributed to each Resource.

Indirect Costs

Each BSEP Resource, except Public Information and P&O Support (Resource 0854) is charged for Indirect Costs. The Indirect Cost rate in FY 2016-17 was 6.41%, as calculated by a formula determined by the State. The rate is applied to all expenses and transfers, and totaled \$1,517,815. The funds are transferred to the General Fund to support the District’s common functions such as Payroll, Purchasing, Human Resources and Plant Operations.

Transfers to General Fund

Two resources, Class Size Reduction (Resource 0841) and Music, Visual and Performing Arts (Resource 0853) transferred a total of **\$15,126,021** to the General Fund. The transfers funded 139.3 FTE to reduce class sizes and 2.32 FTE for music teachers providing General Fund release time. The transfers also supported costs associated with the increased FTE, as permitted by the Measure.

Fund Balance and Reserves

A fund balance is maintained in a central BSEP Resource (0000), to meet the 3% reserve required by the State. The fund balance totaled \$883,185 at the end of FY 2016-17, a reserve of 3.04%. The fund balance was increased from \$825,000 due to the additional reserve required under the new BSEP Measure E1. In addition to the central BSEP fund balance, there are fund balances for each Resource, managed by the program supervisors and District administration.

¹ BSEP Measure A, Section 5.C

**BSEP/Measure A of 2006
Revenue Allocation Summary
FY 2016-17**

	Res	%	Budget 2016/17	Calculated Actuals (1)	Unaudited Actuals (2) As of 6/30/17	Variance
Revenue						
County Tax Collections			\$ 25,345,400	\$ 25,497,227	\$ 25,498,718	\$ 153,318.07
City of Berkeley Tax Collections			\$ 220,000	\$ 321,642	\$ 321,642	\$ 101,642.37
Rebates			\$ (100,000)	\$ (85,015)	\$ (85,015)	\$ 14,984.61
Prior Year Revenue (AR)			\$ -	\$ (36,379)	\$ (36,379)	\$ (36,379.00)
Interest			\$ 15,000	\$ 74,126	\$ 74,126	\$ 59,125.92
Total Projected Revenue			\$ 25,480,400	\$ 25,771,601	\$ 25,773,092	\$ 292,691.97 (3)
Expenses						
County Collection Fees			\$ 430,872	\$ 431,578		
City of Berkeley Fees			\$ 50,000	\$ 48,400		
Audit Expense			\$ 6,000	\$ 6,900		
Total Expenses			\$ 486,872	\$ 486,878		
Net Revenue			\$ 24,993,528	\$ 25,284,724		
Available for Allocation			\$ 24,993,528	\$ 25,284,724		
Public Information/P&O	0854	2.00%	\$ (499,871)	\$ (505,694)		
Net Available for Allocation			\$ 24,493,658	\$ 24,779,029		
Resource Allocation						
			(a)		(b)	(b)-(a)
Class Size Reduction (66%)	0841	66.00%	\$ 16,165,814	\$ 16,354,159	\$ 16,316,523	\$ 150,709.40
Site Discretionary (10.25%)	0852	10.25%	\$ 2,510,600	\$ 2,539,851	\$ 2,534,396	\$ 23,795.97
Libraries (7.25%)	0860	7.25%	\$ 1,775,790	\$ 1,796,480	\$ 1,792,345	\$ 16,555.04
Music/VAPA (6.25%)	0853	6.25%	\$ 1,530,854	\$ 1,548,689	\$ 1,545,466	\$ 14,612.23
Parent Outreach (1.25%)	0857	1.25%	\$ 306,171	\$ 309,738	\$ 309,025	\$ 2,854.60
PD/Evaluation/Technology (9%)						
Prof. Development	0855	36.00%	\$ 793,595	\$ 802,841	\$ 801,754	\$ 8,159.16
Evaluation	0856	28.00%	\$ 617,240	\$ 624,432	\$ 622,994	\$ 5,754.20
Technology	0862	36.00%	\$ 793,595	\$ 802,841	\$ 800,993	\$ 7,398.90
Net Resource Allocation			\$ 24,493,658	\$ 24,779,029	\$ 24,723,497	\$ 229,839.50
Public Information/P&O	0854		\$ 499,871	\$ 505,694	\$ 504,531	\$ -
Total Allocation to All Resources			\$ 24,993,528	\$ 25,284,724	\$ 25,228,028	\$ 229,839.50 (3)

Notes

- (1) Calculated Actuals show how actual revenue would be distributed using the methodology used in the budget process.
- (2) Unaudited Actuals reflect the current year revenue recorded in the books for each Resource
- (3) Increased revenue came from \$99,396 in prior year revenue from the City of Berkeley and additional interest earnings of \$59,126. Revenue distributions to each Resource were reduced in order to increase the reserve needed for budgeted expenditures in the new BSEP Measure E1.

**CLASS SIZE REDUCTION, EXPANDED COURSE OFFERINGS,
MIDDLE SCHOOL COUNSELING, PROGRAM SUPPORT
(BSEP Measure A, Resource 0841)**

OVERVIEW: FY 2016-17

Purpose

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.

The goals for the class sizes to be achieved with these revenues are District-wide Average Class Sizes of 26:1 for the elementary schools grades K-5, 28:1 for the secondary schools, and 18:1 for continuation high school and other secondary opportunity programs. Average class sizes in the K-3 grades shall be reduced to 20:1 as long as state class size reduction funds are provided for that purpose at a level not less than currently funded by the State.

After resultant class sizes meet the goals stated above, additional teachers may be added first to allow for expanded course offerings and then for program support in schools in so far as the funds permit.¹

**Budget Managers: Pasquale Scuderi, Associate Superintendent for Educational Services
Donald Evans, Superintendent**

BACKGROUND INFORMATION

The contribution of BSEP Class Size Reduction (CSR) Funds for classroom teachers is estimated each year 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, at 34:1 for the K-5 grades and 36:1 in grades 6-12, and then calculates additional staffing to be paid for by BSEP Measure A, which provides funds to reduce class sizes toward a district-wide average of 20:1 for K-3, 26:1 for 4-5, 28:1 for grades 6-12, and 18:1 for the continuation high school. The calculation also includes the cost of release time teachers, based on the contractual obligations at each grade level, as well as "necessary FTE" to round out classroom staffing at each school.

At the elementary level, the BUSD class size goal of 20:1 at K-3 was put in place after the State of California began a Class Size Reduction (CSR) program in 1996, rewarding districts that reduced class sizes to that district-wide goal. Thanks to BSEP, our district was one of the few to achieve this goal. However, as of Fiscal Year (FY) 2013-14, the new Local Control Funding Formula from the State changed class size reduction targets to 24:1 for K-3, and reduced the state funding associated with this goal. While the language in BSEP Measure A did allow for adjusting class size goals if the State funding changed, the Board decided to maintain K-3 average class sizes at 20:1 through the expiration of Measure A in FY 2016-17, despite the reduction in funding from the State.

¹ BSEP Measure A, Section 3.A

BSEP ANNUAL REPORT: FY 2016-17

The Teacher Template is developed in the spring of the preceding school year and adopted by the Board of Education as part of the District's Annual Budget in June. When the District's books are closed in September, a final transfer is made from BSEP CSR to the General Fund to pay for the actual FTE required for the class size reduction teachers. 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 for specified purposes, including providing middle school counseling services, funding teachers to provide middle and high school Expanded Course Offerings (ECO), and providing FTE for a variety of positions across the district under the rubric of "program support." These expenditures are directly charged to the Measure.

BUDGETARY CHALLENGES IN 2016-17

During the early years of Measure A, this BSEP resource grew significantly, due to high Cost of Living Adjustments (COLAs) in the 4% range. These revenues provided funds for 20-30 FTE per year in additional staffing, above and beyond the class size reduction calculation. However, in the later years of the measure, BSEP revenues flattened, with a **COLA of 0.00** (zero) percent for the Measure in 2016-17, preceded by COLAs of 0.86 and 1.58%. Meanwhile, enrollment grew, and compensation and associated costs such as STRS also rose significantly. While the Measure could still meet the class size goals, it was necessary to shift the expense of some of the discretionary staffing formerly funded through this BSEP resource back to the General Fund, which had finally seen some restoration of funding through LCFF.

The following is the Revenue and Expenditure summary report for 2016-17 for expenditure of BSEP funds towards Class Size Reduction and additional purposes included in this resource.

BSEP ANNUAL REPORT: FY 2016-17

2016-17 CLASS SIZE REDUCTION FUND – REVENUE AND EXPENDITURES

	Budget	Actual	Variance
Revenue	16,142,284	16,316,524	174,240
Revenue Transfers to the General Fund			
Teacher Compensation (139.3 FTE)	(13,967,700)	(14,256,756)	(289,056)
Direct Support	(391,700)	(395,051)	(3,351)
Substitute Compensation	(251,900)	(253,898)	(1,998)
Total Revenue Transfers	(14,611,300)	(14,905,705)	(294,405)
Expenditures			
Certificated Teacher Salaries	89,969	90,122	153
Certificated Counselor Salaries	439,304	436,150	(3,154)
Employee Benefits	159,084	157,378	(1,706)
Indirect Cost	980,708	999,278	18,570
Total Expenditures	1,669,065	1,682,928	13,863
	Beginning	Ending	Decrease
Fund Balance	446,072	173,963	(272,109)

RESOURCE SUMMARY

At the time the recommendation for expenditures was made, the projected shortfall for this budget was **\$1,874,747**, based on average teacher costs and 136.48 FTE in the teacher template, together with discretionary staffing for the secondary purposes. The expectation was that after the planned expense of the Teacher Transfer, there would be sufficient funds remaining in this BSEP resource to fund Middle School Counselors (4.8 FTE) and 1.2 FTE for TWI Support.

As a result of the shortfall, the General Fund picked up the expense for Expanded Course Offerings (7.2 FTE) and some of the cost of FTE in Program Support (9.15 FTE). The expense to the General Fund was less than had been projected, at **\$1,579,283**.

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Discretionary FTE was funded based on the following table:

Program	GF	BSEP	Total	Plan
Expanded Course Offerings				
Middle School	1.20	0.00	1.20	1.60
Berkeley High	6.00	0.00	6.00	6.00
	7.20	0.00	7.20	7.60
Middle School Counseling	0.00	4.80	4.80	4.80
Program Support				
TWI	0.60	1.20	1.80	1.80
Lit Coaches	3.30	0.00	3.30	3.30
RTI				
Elementary	2.75	0.00	2.75	2.75
Middle School	2.50	0.00	2.50	2.75
Total Program Support	9.15	1.20	10.35	10.60
Total FTE	16.35	6.00	22.35	23.00

The ending fund balance was **\$173,963**. The remaining funds are available for future expenditure for the purposes outlined in Measure A, including class size reduction, middle school counseling, expanded course offerings, and program support.

STATUS REPORT

There were sufficient funds to meet the class Size Reduction goals of BSEP Measure A, and to provide for some additional purposes, with the support of the General Fund for some of the programs previously funded through BSEP.

It should be noted that this BSEP Resource met the goal of funding class size reduction throughout the life of the Measure, providing over \$150,000,000 toward that goal. This resource also provided significant support and opportunities for our students through middle school counseling, expanded course offerings at the Middle Schools and Berkeley High, and program support staffing including TWI support, Literacy Coaches, ULSS/RtI staffing, Middle School and High School math teachers, and teachers to provide targeted High School student support.

As we look at the General Fund contribution toward some of the discretionary staffing costs in this final year of the measure, it's important to understand the cycle of funding over the 10 year span of the Measure. In early years, BSEP was called upon to provide more FTE for the ancillary purposes of the CSR resource, during a period when the General Fund was suffering from the

BSEP ANNUAL REPORT: FY 2016-17

lack of State Funding during the Great Recession. In the later years the tables were turned, as state funding through LCFF provided the means for the General Fund to address needs for compensation and benefit cost increases, while BSEP, with low (to no) COLA, could not meet the demands of higher costs while also supporting as much additional FTE. Reductions were made in some staffing areas, including eliminating the math class size reduction teaching positions for middle school and high school, and reducing some of the FTE for expanded course offerings. EIA carryover was used in 2015-16 to pick up some of the Literacy Coach costs, and the General Fund picked up 0.09 FTE at each site for Literacy Coaches, for a total of **\$97,185**.

In the final year of the Measure, the General Fund then provided **\$1,579,283** to support some of the district's priority programs for TWI, Literacy Coaches and RtI. While this staffing was paid for in part by BSEP Program Support in prior years (and in the case of Literacy Coaches and RtI staff, continues to be paid for by BSEP through Professional Development and Site Funds), these are not "BSEP Programs" per se, in that they are not specified in the Measure. These are BUSD programs that have been funded in part, and at certain times by BSEP. The General Fund commitment to share responsibility for funding some essential program support positions was explained in the Budget Priorities documents that went to the Board Feb 10, 2015 and May 6, 2016.

Our district is fortunate to have the flexibility of drawing upon multiple funding strategies, calling upon BSEP, the General Fund and other resources when available to support our students and the dedicated staff who serve them.

BERKELEY UNIFIED SCHOOL DISTRICT
BERKELEY SCHOOLS EXCELLENCE PROGRAM (BSEP)
CLASS SIZE REDUCTION (Measure A, Resource 0841)
Revenue and Expenditures
Comparison Report FY 2016/17

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, Assistant Superintendent for Educational Services

	Audited Actuals 2015/16 As of 6/30/16	Adopted Budget 2016/17 As of 7/1/16	2nd Interim Budget 2016/17 As of 1/31/17	Unaudited Actuals 2016/17 As of 6/30/17	2nd Interim Budget vs. Unaudited Actuals 2016/17
REVENUE					
Revenue	16,289,729	16,165,814	16,142,284	16,316,524	174,240
BSEP Contribution to General Fund (1)	(12,708,730)	(13,967,700)	(13,967,700)	(14,256,756)	(289,056)
BSEP Direct Support (2)	(390,071)	(391,700)	(391,700)	(395,051)	(3,351)
BSEP Substitute Compensation (1)	(238,796)	(251,900)	(251,900)	(253,898)	(1,998)
NET REVENUE	2,952,132	1,554,514	1,530,984	1,410,819	(120,165)
EXPENDITURES					
Certificated Monthly Salaries (3)	1,064,332	93,384	89,969	90,122	153
Certificated Counselors Salaries (3)	402,323	404,459	439,304	436,150	(3,154)
Employee Benefits (3)	391,654	146,831	159,084	157,378	(1,706)
Unallocated Reserve	0	0	0	0	0
Indirect Costs	993,812	977,908	980,708	999,278	18,570
TOTAL EXPENDITURES	2,852,121	1,622,582	1,669,065	1,682,928	13,863
NET INCREASE (DECREASE)	100,011	(68,068)	(138,081)	(272,109)	(134,028)
FUND BALANCE ANALYSIS					
Beginning Fund Balance	346,061	446,072	446,072	446,072	0
Net Increase (Decrease) in Fund Balance	100,011	(68,068)	(138,081)	(272,109)	(134,028)
Ending Fund Balance	446,072	378,004	307,991	173,963	(134,028)

Notes

- (1) 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 2014/15 it funded 136.83 FTE. In 2015/16 it funded 135.92 FTE and in 2016/17 it funded 139.3 FTE.
- (2) Operational and other costs associated with opening and maintaining additional classrooms.

- (3) In 2015/16, total FTE directly charged to Class Size Reduction includes 7.3 FTE for Program Support, 7.6 FTE for Expanded Course Offerings in the Middle Schools and Berkeley High School, and 4.80 FTE for Middle School Counseling for a total of 19.7 FTE. This is a reduction in BSEP funding of 3.7 FTE from the prior year. Of the 3.7 FTE, 3.3 FTE for Literacy Coaches was funded by General Fund Resources. Expanded Course Offerings were reduced by .4 FTE at Berkeley High. In 2017/17, Discretionary FTE was funded based on the following table:

0841 FTE Summary 2016/17

Program	GF	BSEP	Total	Plan
Expanded Course Offerings				
Middle School	1.20	0.00	1.20	1.60
Berkeley High	6.00	0.00	6.00	6.00
	7.20	0.00	7.20	7.60
Middle School Counseling	0.00	4.80	4.80	4.80
Program Support				
TWI	0.60	1.20	1.80	1.80
Lit Coaches	3.30	0.00	3.30	3.30
RTI				
Elementary	2.75	0.00	2.75	2.75
Middle School	2.50	0.00	2.50	2.75
Total Program Support	9.15	1.20	10.35	10.60
Total FTE	16.35	6.00	22.35	23.00

**SCHOOL SITE DISCRETIONARY PROGRAMS
(BSEP Measure A, Resource 0852)**

Purpose:

The School Governance Council shall develop recommendations to allocate these revenues for the personnel, services and materials required to deliver effective activities leading to improved student performance...Revenues may be used for...arts and sciences instruction, academic tutoring and counseling, athletics and student activities, and before and after school programs¹

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

The budgeted revenue allocated to the BSEP School Discretionary program in FY 2016-17 was \$2,510,600. This allowed for allocations to the sites of \$235 per pupil.² The expenditure budget for FY 2016-17 was based on this revenue allocation to each site, plus the carryover generated by unspent balances for each site.³

Each School Governance Council (SGC) or 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 Discretionary funds were utilized across the district to support the School Plans, based on the Unaudited Actuals for 2016-17 as of June 30, 2017.

Staffing (76.93% of total actual expenditures)

Budget: \$2,068,014 Actual: \$1,914,425 Variance: (\$153,589)

- Certificated salaries \$ 991,002
- Classified salaries \$ 521,689
- Employee benefits \$ 401,734

Books and Supplies, and Unallocated Funds (6.16% of total actual expenditures)

Budget: \$238,302 Actual: \$153,170 Variance: (\$85,132)

Contracted Services (10.89% of total actual expenditures)

¹ BSEP Measure A, Section 3.B.i

² Revenue is allocated to each school site based on prior-year enrollment. For Independent Study, Berkeley Technology Academy (BTA) and Early Childhood Development, the allocation is based on an agreed-upon average enrollment. Independent Study enrollment is deducted from Berkeley High's CALPADS enrollment. For FY 2016-17, the adjusted enrollment was 10,359 students.

³ The **Fund Balance** consists of monies that are held centrally, as well as unspent balances from the prior year. Unspent balances include the difference between the budget allocated to each site and actual expenditures. In FY 2016-17, the unspent balance from the prior year of \$480,805 was posted as carryover, along with the associated Indirect Cost, once the books were closed in September.

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Budget: \$285,672 Actual: \$270,921 Variance: (\$14,751)

Indirect Costs (6.02% of total expenditures)

Budget: \$186,863 Actual: \$149,899 Variance (\$36,964)

Fund Balance

Beginning: \$676,497 Ending: \$722,478 Increase: \$45,981

RESOURCE SUMMARY:

In FY 2016-17, the per-pupil allocation was increased to \$235, an increase of about 2.2% from the \$230 provided in the previous two years. At Berkeley High, enrollment fell by 1.85%, but the increased per pupil allocation helped maintain a similar level of program funding. Middle school enrollment increased by 4% over the previous year, as a larger 5th grade cohort moved up from 2,028 to 2,109. The elementary school enrollment remained essentially flat from 4,468 to 4,484, which meant that the increased per-pupil funding from BSEP provided a significant boost to discretionary funds for 2016-17. Berkeley Technology Academy (BTA) and Berkeley Independent Study (BIS) both received a flat allocation based on 150 students, although student populations in those programs typically fluctuate throughout the academic year, and at BTA the enrollment has not approached 150 in recent years.

At the end of FY 2016-17, most sites had unexpended funds in their BSEP Site Discretionary budgets, though that amount varied widely. On average, elementary sites expended 77.5% of their overall budgets (including carryover funds), ranging from a low of 56.42% to a high of 97.77%. In almost all cases, unexpended funds remained in materials and supplies budgets. In some cases, hourly budgets were not fully expended. Middle schools expended an average of 86.46% of their total budgets for the year. Berkeley High expended 85.57% of its allocated budget, in part reflecting the set-aside for personnel variance. BIS expended 58.92% of its allocated budget while BTA expended 87.13% of its allocated budget. ECE expended 53.96% of its budget. All allocated BSEP School Site Discretionary dollars that were unspent at the end of FY 2016-17 were carried over to the site budgets for expenditure in FY 2017-18, as under the new measure, the purpose of Site Discretionary Funds remained consistent. Site budgets will therefore draw upon both Measure A and Measure E1 funds to achieve site plan goals.

STATUS REPORT

School Site Discretionary funds continued to provide a broad variety of programs for students, with each site's plan reflecting the needs and priorities of the school. BSEP site funds are frequently used for student support, enrichment activities, and instructional materials.

Significant resources (76.93% of total expenses) go to funding certificated (49.72%) and classified (27.21%) staff. Every elementary school uses site funds to partially fund a Literacy Coach. Other certificated positions partially funded by BSEP site funds at elementary sites include Response to Intervention (RtI) teachers/coordinators, ELD teachers, a Reading Intervention teacher, a Math Intervention teacher, a Math Coach, a Technology teacher, Dance, Art and Music teachers, and Counselors.

BSEP ANNUAL REPORT: FY 2016-17

Classified positions funded through discretionary funds at both elementary and secondary levels included Instructional Assistants (IAs) to support classroom teachers, Instructional Specialists for Dance, Drama, PE, and Athletics, a School Service Assistant, and increased FTE for a Library Media Tech. These expenditures also include certificated and classified hourly work for intervention and tutoring, as well as for staff collaboration and professional development.

The next largest area of expenditure, at 10.89% of the total budget, was for contracted services. Many sites contracted for counseling services, professional development, PE services, enrichment contracts, mentoring and tutoring services, and one writing coach. BHS contracted for music coaching and the R.I.S.E. Scholar program, while BIS funded a contract for Occupational Therapy Training. These funds also covered field trip admissions at several sites.

BSEP site funds continue to be an important resource for instructional materials, constituting 6.2% of the total expenditures to pay for books, materials, supplies and equipment. These expenditures totaled \$153,170.

The Berkeley High budget supported a broad spectrum of programs, including College and Career Advising, Academic Support Services, Student Welfare and Attendance, and an ELL Intervention Program, as well as funding a Volunteer Coordinator and staff to run an African/Haitian Drum course. At Berkeley Technology Academy (BTA), site funds contributed support of 0.42 FTE for the full-time Student Welfare and Attendance Specialist, while in the Independent Study Program (BIS), site funds provided hourly tutoring and mentoring, gardening program support, certificated hourly instruction, an occupational therapy training contract, certificated hourly for curriculum development, and instructional materials.

While site plans vary from site to site, and vary considerably between primary and secondary sites, activities supported by BSEP discretionary funds all served to further the District goals of improving academic achievement and promoting student success.

**BERKELEY UNIFIED SCHOOL DISTRICT
 BERKELEY SCHOOLS EXCELLENCE PROGRAM (BSEP)
 SCHOOL SITE DISCRETIONARY PROGRAM (Measure A, Resource 0852)
 Revenue and Expenditures
 Comparison Report FY 2016/17**

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
 Valerie Tay, BSEP Program Specialist

	Audited	Adopted	2nd Interim	Unaudited	2nd Interim
	Actuals	Budget	Budget	Actuals	Budget vs.
	2015/16	2016/17	2016/17	2016/17	Unaudited
	As of	As of	As of	As of	Actuals
	6/30/16	7/1/16	1/31/17	6/30/17	2016/17
REVENUE	2,529,844	2,510,600	2,506,946	2,534,396	27,450
EXPENDITURES					
Certificated Salaries	896,835	977,580	1,067,732	991,002	(76,730)
Classified Salaries	546,096	529,029	552,672	521,689	(30,983)
Employee Benefits	372,477	452,743	447,610	401,734	(45,876)
Books & Supplies	210,343	104,915	237,402	141,389	(96,013)
Equipment	14,401	0	900	11,781	10,881
Unallocated Reserve and Carryover	0	123,052	324,388	0	(324,388)
Contracted Services	299,461	248,252	285,672	270,921	(14,751)
Indirect Costs	153,011	156,043	186,863	149,899	(36,964)
TOTAL EXPENDITURES	2,492,624	2,591,614	3,103,239	2,488,415	(614,824)
NET INCREASE (DECREASE)	37,220	(81,014)	(596,293)	45,981	642,274
FUND BALANCE ANALYSIS					
Beginning Fund Balance	639,277	676,497	676,497	676,497	0
Net Increase (Decrease) in Fund Balance	37,220	(81,014)	(596,293)	45,981	642,274
Ending Fund Balance	676,497	595,483	80,204	722,478	642,274

Notes

projection is adjusted for Independent Study, Berkeley Technology Academy (BTA) and Early Childhood Development and is based on an agreed-upon average enrollment. Independent Study enrollment is deducted from Berkeley High's enrollment. In FY 2014-15, adjusted enrollment was 9,965, in FY 2015-16 it was 10,322 and in FY 2016-17 it was 10,359.

**MUSIC, VISUAL AND PERFORMING ARTS
(BSEP Measure A, Resource 0853)**

OVERVIEW: FY 2016-17

Purpose:

Providing quality instructional programs in music and the visual 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 programs¹

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

BACKGROUND INFORMATION

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

For the first seven years of BSEP Measure A’s existence, this BSEP resource carried the entire cost of the two periods of release time music teachers, provided as a contribution to the General Fund. However, with enrollment growth and cost increases, the BSEP fund balance dwindled, and revenues were not keeping pace with projected costs. Therefore, beginning in 2014-15, the General Fund assumed half the cost of the music teacher release time, which reduced the BSEP contribution by an equal amount. For 2016-17, half of the release time FTE was funded by the General Fund and half contributed by BSEP (equivalent to 2.32 FTE).

In addition to the music teachers in the General Fund, BSEP provides supplemental music teachers for fourth and fifth grades to 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 that 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

¹ BSEP Measure Section 3.B.ii.b

BSEP ANNUAL REPORT: FY 2016-17

Fund Balance

Beginning: \$335,087

Ending: \$461,033

Increase: \$125,946

RESOURCE SUMMARY

There was a significant increase to fund balance during 2016-17, which was primarily due to turnover in music staffing, with several new teachers coming in at a much lower place on the salary schedule. The reduction in the central office VAPA Tech's position to .8 FTE also contributed to the decrease in program costs.

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 four 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, along with scholarships and tutors 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 2016-17 include:

- All fourth and fifth graders participated in the music program, regardless of ability to pay for instruments.

BSEP ANNUAL REPORT: FY 2016-17

- 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. More and more teachers are taking the district’s 3-day cultural competency training with Pamela Harrison-Small. 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.
- 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, 2017.
- VAPA entered into a 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 Washington teachers . The partnership will most likely expand into district-wide PD plus service to more schools in coming years. This partnership also continues to qualify VAPA to receive support from the Kennedy Center.
- For the first time ever, VAPA successfully offered Chorus classes at all three middle schools, with the addition of .2 FTE to fund a chorus class at Willard.
- As the VAPA department continues to make equity its first priority, we are happy to report that 75% (3 out of 4) of the new hires for 2016-17 were teachers of color and 75% were bilingual.

Progress toward Smart Goals

A. Equity Goal #1: By 2016-17 offer chorus classes at all three middle schools.

Result: Goal was met by adding a 5th period chorus class at Willard 2016-17. Success of the class was limited due to Willard-specific scheduling difficulties. For 2017-18 chorus was moved to zero period and has been extremely successful (both in enrollment and in student learning).

B. Equity Goal #2: By 2017-18 offer at least one “strum and drum” class (drumline, ukulele, guitar, chorus, world percussion) at each elementary that merits more than three music classes.

Result: Strum & drum classes continue to expand in 2017-18. This was due to creative planning and scheduling done in the 2016-17 school year.

Considerations for 2017-18: Smart goal should be adjusted to schools with more than 4 classes. The pathway from strum & drum classes to middle school music needs to be clearly articulated.

C. Technology Goal: In 2016-17, music teachers will use technology in the 4th and 5th grade music classroom (interactive apps, having students play along to rock/hip-hop drum tracks, showing live performances, etc.) on a weekly basis.

Result: All music teachers received iPads as part of a special budget line item planned for 2016-17. All music teachers used iPads in their classrooms for video recording, audio recording, interactive music apps, positive behavior apps, communication with department and families, etc. Teachers also used iPads to collect and present data in PLCs during our Mills Teacher Scholars time.

BERKELEY UNIFIED SCHOOL DISTRICT
BERKELEY SCHOOLS EXCELLENCE PROGRAM (BSEP)
MUSIC , VISUAL AND PERFORMING ARTS (Measure A, Resource 0853)
Revenue and Expenditures
Comparison Report FY 2016/17

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, Assistant Superintendent for Educational Services
Pete Gidlund, VAPA Program Supervisor

	Audited Actuals 2015/16 As of 6/30/16	Adopted Budget 2016/17 As of 7/1/16	2nd Interim Budget 2016/17 As of 1/31/17	Unaudited Actuals 2016/17 As of 6/30/17	2nd Interim Budget vs. Unaudited Actuals 2016/17
REVENUE					
Revenue	1,542,588	1,530,854	1,528,626	1,545,466	16,840
Transfers to General Fund (Release Time) (1)	(204,552)	(216,290)	(219,638)	(220,316)	(678)
NET REVENUE	1,338,036	1,314,564	1,308,988	1,325,150	16,162
EXPENDITURES					
Certificated Salaries	693,526	761,167	682,679	657,613	(25,066)
Classified Salaries	42,608	49,284	49,284	48,086	(1,198)
Employee Benefits	206,470	249,770	224,517	214,042	(10,475)
Instructional Materials/Instruments	17,331	96,400	84,795	66,197	(18,598)
Equipment	51,763	9,000	20,605	33,121	12,516
Unallocated Reserve	0	47,568	152,286	0	(152,286)
Conference/Mileage/Instructional Contracts	106,639	108,800	104,475	94,635	(9,840)
Capital Outlay	0	0	0	0	0
Indirect Costs	86,517	99,117	99,117	85,510	(13,607)
TOTAL EXPENDITURES	1,204,854	1,421,106	1,417,758	1,199,204	(218,554)
NET INCREASE (DECREASE)	133,182	(106,542)	(108,770)	125,946	234,716
FUND BALANCE ANALYSIS					
Beginning Fund Balance	201,905	335,087	335,087	335,087	0
Net Increase (Decrease) in Account Balance	133,182	(106,542)	(108,770)	125,946	234,716
Ending Account Balance	335,087	228,545	226,317	461,033	234,716

**PUBLIC INFORMATION
(BSEP Measure A, Resource 0854)**

Purpose

Public information, translation services for District families and support of the Planning and Oversight Committee¹

**Budget Managers: Donald Evans, Superintendent
Natasha Beery, Director of BSEP and Community Relations**

Classified Salaries

Budget: \$355,526 Actual: \$324,910 Variance: (\$30,616)

- Director of BSEP and Community Relations 1.0 FTE
- BSEP Program Specialist 1.0 FTE
- Public Information Officer 1.0 FTE
- Specialist, Translation and Interpretation 0.5 FTE

In addition to salaried positions, hourly staff continued to provide P&O meeting support (set-up, minutes) and some additional translation services.

Employee Benefits

Budget: \$133,422 Actual: \$122,552 Variance: (\$10,870)

Contracted Services

Budget: \$94,000 Actual: \$57,393 Variance: (\$36,607)

Explain reason for reduced expenditures; only one printed A+ News etc.

Equipment and Supplies

Budget: \$10,000 Actual: \$9,692 Variance: (\$308)

Fund Balance

Beginning: \$284,344 Ending: \$274,328 Decrease: (\$10,016)

RESOURCE SUMMARY:

- The current fund balance is a legacy of a two-year period of under-staffing. The office has been fully staffed since FY 2013-14, and since then with planned deficit spending, expenditures have been drawing upon the fund balance. There were some small savings in staffing in 2016-17 due to an employee leave and a transition in PIO staffing.
- In an effort to align the revenue and expenses in this fund in anticipation of future increases in costs and the eventual diminishment of the fund balance, contracted expenses were reduced - the Superintendent's budget took on part of the cost of communications consulting, and the Community Report became an from an Annual rather than BiAnnual publication, which saves on printing, mailing, layout/graphics and editing expense.

¹ BSEP Measure Section 6A

STATUS REPORT

The BSEP Director and Program Specialist supported the following core BSEP functions:

- Implementation and monitoring of operational and technical tasks for the BSEP programs, working alongside the Senior Budget Analyst to ensure careful oversight of fund expenditures;
- Partnership with each school principal and School Governance Council (SGC/SSC) to analyze and develop the BSEP School Discretionary Fund budget and plan;
- Support for the September SGC/SSC elections and the appointment of P&O Representatives from each school site in October;
- SGC and Parent Leader Orientation Workshops in October, and Orientation for new P&O Representatives in November;
- Preparation of the annual SGC Elections, Diversity, and Activity Report for the Board in December;
- January “State of the District” workshop in collaboration with the Director of Special Projects and Programs as an update on LCAP plan and a leadership training opportunity for all District and school committees (SGCs, PAC, PTA, DELAC/ELAC).
- Planning and facilitation of 15 P&O Committee meetings, providing documents, coordinating guest speakers, and preparation of presentations;

Community organizations, SGCs, PTA’s, newspapers, and other stakeholder groups asked for information about the E1 ballot measure. The BSEP Office provided factual information about the components of the new measure, and also provided guidance to principals and other District leaders as to the appropriate role of public employees during a political campaign (not only related to Measure E1, but to local and national politics). The final vote tally from the November 9 election put Measure E1 well beyond the minimum 2/3 vote required, at a record approval level of 88.86% of the electorate.

The BSEP Office worked closely with the Deputy Superintendent, Fiscal Services, the P&O Committee, and BSEP Managers to oversee the fiscal and programmatic transition to the new measure structure which replaced the expiring Measure A as of July 1 2017.

District Communications and Community Relations

The BSEP Director convenes the Communications Team on a weekly basis to ensure continued improvement in communications with families, staff and the wider Berkeley community. The Communications Team includes staff members from Parent Outreach, Translation, the Superintendent’s Office, and Technology, and makes strategic use of outside contractors for some content, consultation, translation, printing, and mailing services.

The Communications Team contributed to a number of new and revised Board Policies and Administrative Regulations, including Crisis Communications, Media Relations, District and School Websites, and Social Media.

ANNUAL REPORT OVERVIEW: FY 2016-17

In FY 2016-17, some of the “top content” items that needed consistent communication and strategic community involvement, included:

- Post-election policies and supports for undocumented students and immigrant families
- Post-election student and staff activism
- BHS Principal departure
- Social Media and related policies (Websites, School-Connected Organizations)
- Facilities Plans
- Name change petition from Le Conte school community

To reach our varied audiences 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 13,000 subscribers, both staff and families.

The BUSD website provides access to information about District programs and services, departments, facilities, and new initiatives, with the most visited pages being those covering Admissions, Human Resources, the District Calendar, and the School pages. Blog posts on the homepage are used to serve as a source for immediate updates and meeting postings, and link the reader to other related pages on the website.

The *Community Report* is a four-page document produced and mailed to 46,000 residential addresses in Berkeley in December, providing an update on BUSD facilities, finances, the Year of the Reader, and the new BSEP measure. It was also translated into Spanish, and both English and Spanish print versions were distributed at schools.

Public Information Officer

- Covered District issues and student events, including documenting and photographing student activities, District meetings, and community forums, and wrote articles and news updates for the District website and other District communication channels.
- Managed the District’s responses to Public Record Act requests.
- Compiled and distributed an expanded Weekly Bulletin with mini-reports on a wide variety of Board actions and activities and programs across the District.
- Drafted communications for multiple departments.
- Coordinated the annual publication of the School Accountability Report Card (SARC) for each school.
- Responded to requests from news media, community members, and local organizations.
- Attended Board meetings and assisted with staff presentations and with Berkeley Community Media and the Technology Director to ensure broadcast of Board Meetings and YouTube streaming.

ANNUAL REPORT OVERVIEW: FY 2016-17

- 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.
- Convened local PIOs to create new network to meet and share best practices

Translation and Interpretation

When the BUSD English Learner (EL) population exceeds 15% for the Spanish language, key District documents must be translated into Spanish. The full-time Translation and Interpretation Specialist position is co-funded 50% with the General Fund and 50% from BSEP Resource 0854. In 2016-17, the BSEP Office and Translation Specialist provided Spanish translation and interpretation to support District-wide and school site-specific communications, including:

Translation of Documents:

- *A+ Newsletter* (every two weeks)
- Community Report
- Welcoming letters and messages from Superintendent
- 2016 Chavez Huerta Commemoration
- Family Technology Event Flyers
- SB277 Immunization FAQ
- Student Services Forms and Letters (7 documents)
- BSEP Documents and PowerPoints
- LCAP Documents and PowerPoints
- DELAC Documents and PowerPoints
- BEARS and LEARNS communications
- Translation of Parent Student Handbook - 48+ pages
- IEP Documents (14+ IEPs for a total of more than 57,000 words translated)
- Educational Services Documents
- Office of Family Engagement and Equity Documents
- Cooking and Gardening Program Flyers and Brochures, Survey, Assessment
- Cover Letter and Parent Media Consent Form
- Language Proficiency Test Results - Parent Letters
- BUSD Bullying Board Policy and Bullying Complaint Form
- BHS Final Spring Testing Letter 2017
- Immigration Rights Video
- BUSD Preschool Parent Handbook

Simultaneous Interpretation:

- Interpretation for community forums and workshops, including SGC training
- Interpretation for DELAC
- Interpretation offered at Board Meetings
- Recording of telephone blasts from Superintendent's Office
- Office of Family Engagement and Equity translation and interpretation
- IEP meetings (10 meetings)
- Interpretation for Student Services for Latino families and SARBS (5-7 meetings)
- Interpretation for employees

In order to ensure the inclusion of families who require communication in a language other than English, contracted interpretation services are available via the Language Line, a telephone-based service providing simultaneous translation in many languages. Use of Language Line continues to increase, with users (principals, teachers, counselors, the Admissions department) reporting very high quality services offered in a wide variety of languages. Hourly on-call interpreters have provided interpretation for parent teacher conferences, IEPs, and other student support services in Spanish (1,062 minutes), Arabic (230 minutes), Tigrinya (104 minutes), Dari (170 minutes), Pashto (89 minutes), and Southeast Asian languages including Vietnamese, Cambodian, Laotian, and Thai (183 minutes).

Progress on 2016-17 Smart Goals

1. School Messenger Service (SMS): expand use through smartphone app and/or by opting in to the SMS text system.

Result: Implementation postponed until 2017-18 to give more time to integrate with other messages about accessing district information through Parent Portal.

2. Create bilingual library of templates and resources for emergency messages to be used by schools and district.

Result: Crisis Communications Administrative Regulation created with guidelines for messages. Sharing resources with other districts (both local and state through CalSPRA), but no formal centralized message template system exists yet.

3. Increase subscription and readership of *A+ News* from 10,000 subscriptions with 24% open rate. Test using A+ News articles in school newsletters and on social media. Over summer, test using Facebook and other Social Media (Twitter, Instagram) for a few key stories.

Result: A+ News readership increased from 10K to 13.5K, and 24% open rate increased to 31%. Spanish readership grew from 308 to 357, and from 19% open rate to 31% open rate. A+ News articles shared on Facebook. Facebook was launched mid-year, but neither Twitter nor Instagram are used currently.

4. Collaborate with the Office of Family Engagement and Equity (OFEE) on School Governance Council (SGC) and leadership development and rewrite SGC bylaws for greater participation, effectiveness and inclusiveness.

Result: Discussions about the Bylaws began in 2016-17, with OFEE, P&O; significant issues were discussed with BP Subcommittee. A revised draft, aligned with Measure E1 language and current policy and practice was reviewed 12/1/17, and will go to School Site Councils, Principals and the BSEP Planning and Oversight Committee (P&O) for comment.

**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 2016/17**

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

	Audited	Adopted	2nd	Unaudited	2nd
	Actuals	Budget	Interim	Actuals	Interim
	2015/16	2016/17	2016/17	2016/17	Budget
	As of	As of	As of	As of	vs.
	6/30/16	7/1/16	1/31/17	6/30/17	Unaudited
					Actuals
					2016/17
REVENUE	503,702	499,871	499,143	504,531	5,388
EXPENDITURES					
Classified & Certificated Salaries	331,680	363,361	355,526	324,910	(30,616)
Employee Benefits	117,523	131,211	133,422	122,552	(10,870)
Materials and Supplies	1,939	6,000	6,000	3,010	(2,990)
Unallocated Reserve	0	19,128	27,752	0	(27,752)
Equipment	0	4,000	4,000	6,682	2,682
Contracted Services	66,065	97,000	94,000	57,393	(36,607)
TOTAL EXPENDITURES	517,207	620,700	620,700	514,547	(106,153)
NET INCREASE (DECREASE)	(13,505)	(120,829)	(121,557)	(10,016)	111,541
FUND BALANCE ANALYSIS					
Beginning Fund Balance	297,849	284,344	284,344	284,344	0
Net Increase (Decrease) in Fund Balance	(13,505)	(120,829)	(121,557)	(10,016)	111,541
Ending Fund Balance	284,344	163,515	162,787	274,328	111,541

**PROFESSIONAL DEVELOPMENT
(BSEP Measure A, Resource 0855)**

Purpose

Providing professional development for the District's teachers and staff^d

**Budget Manager: Pasquale Scuderi, Assistant Superintendent for Educational Services,
Michelle Sinclair, Coordinator of Professional Development**

Salaries

<i>Budget: \$649,656</i>	<i>Actual: \$603,539</i>	<i>Variance: (\$46,117)</i>
<ul style="list-style-type: none"> ● Coordinator of Professional Development ● Teachers on Special Assignment (TSAs): <ul style="list-style-type: none"> ● 11 Elementary Literacy Coaches ● Elementary Literacy Lead Coach ● BHS Professional Development Leaders ● TSA for Instructional Technology 		0.40 FTE ² 2.75 FTE 0.60 FTE ² 2.00 FTE 0.50 FTE ²

Employee Benefits

<i>Budget: \$158,008</i>	<i>Actual: \$151,527</i>	<i>Variance: (\$6,481)</i>
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Services, Materials and Other Operating Expenses

<i>Budget: \$41,000</i>	<i>Actual: \$21,757</i>	<i>Variance: (\$19,243)</i>
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Indirect Costs

<i>Budget: \$57,094</i>	<i>Actual: \$49,794</i>	<i>Variance: (\$7,300)</i>
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Fund Balance

<i>Beginning: \$229,756</i>	<i>Ending: \$204,893</i>	<i>Decrease: \$24,863</i>
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RESOURCE SUMMARY

The BUSD Professional Development program has used BSEP funds in conjunction with state and federal resources. For FY 2016-17, other resources were available to fund some of the hourly work, stipends and consultants necessary for the professional development program, resulting in savings for BSEP funds. Expenses were also reduced when plans to hold school workshops in literacy for the Year of the Reader were changed - instead other funds were used to bring presenters from the *Teacher College Reading and Writing Project* using other funds.

¹ BSEP Measure A, Section 3.C.

² Multi-funded to 1.0 FTE

STATUS REPORT

In 2016-17, Professional Development priorities included a focus on literacy, support for new teachers, a focus on building cultural competency, and support in implementing the Common Core State Standards. Highlights from last year included:

- 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;
- Literacy coaches and teacher leader groups were given the opportunity to meet and collaborate in Professional Learning Communities ensuring the implementation of best practices throughout the district;
- Teacher Leaders collaborated to provide professional development, supporting sites with curriculum implementation, and work in Professional Learning Communities to identify and target students' instructional needs;
- At Berkeley High, teacher teams in professional learning communities were supported with a focus on lesson study, action research and in implementing *Constructing Meaning* strategies;
- A working group of 6th-8th grade teachers, TSAs and Principals came together over several months to write Digital Literacy Scope and Sequence guides that are connected to the content and curriculum of those grade levels. Additionally, this Technology Working Group in conjunction with the DigiTech team developed school wide Digital Citizenship curriculum for the middle schools and created the structure to ensure that all students are taught 3 Digital Citizenship lessons each year.
- In the summer of 2017, all 6th grade teachers of the 4 core subjects (English, History, Science and Math) became Google Certified Educators or did coursework and an alternative assessment developed by DigiTech in preparation for receiving their own cart of Chromebooks for the '17-'18 school year.
- A summer *Instructional Technology Institute* had two days of workshops for all 6th-12th grade math teachers, led by DigiTech staff and Dan Meyer of Desmos, a math modeling software.
- *Cultural Competency Foundational Academies* 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.

Progress on 2016-17 Smart Goals

A. Cultural Competency Goal: The goal was that to provide three Cultural Competency Academies, with up to 90 teachers participating.

Result: We provided three Cultural Competency Academies throughout the school year. We fell short of our 90 participant goal, but included our classified staff, and provided Cultural Competency training to 75 staff members.

B. Instructional Technology Goal: The goal was that instructional technology would be integrated into at least three Professional Development sessions per grade span: K-5, 6-8, 9-12. The funds allocated to the Instructional Technology TSA in this budget would directly support the instructional technology professional development efforts underway in a joint/collaborative effort called “DigiTech” with the technology and library departments.

Result:

DigiTech led three half-day Professional Development days on integrating technology and the equity strategies for all 4th-5th grade teachers. Additionally there were Instructional Technology workshops at both the October and November no-school PD days for elementary and middle school teachers. The work of DigiTech has focused on deepening the impact of our district-wide equity strategies through technology integration in conjunction with our adopted curriculum.

C. Elementary Literacy Goal: The goal was that by the end of the 2016-17 school year, 60% of all elementary teachers will have attended at least one supplemental workshop (after school/evenings), in addition to regularly scheduled professional learning sessions. This work would be facilitated by literacy coaches and focus on strengthening instruction using the Teachers’ College Reading and Writing Project curriculum.

Result: This goal was not reached during after school hours, instead we felt the need to strengthen literacy kindergarten through 5th grade by bringing Columbia University’s Teachers’ College Reading Writing Project to our January 2017 Staff Development Day. All school sites continued literacy professional development during Wednesday staff meetings.

**BERKELEY UNIFIED SCHOOL DISTRICT
BERKELY SCHOOLS EXCELLENCE PROGRAM (BSEP)
PROFESSIONAL DEVELOPMENT
Revenue and Expenditures (Measure A, Resource 0855)
Annual Report FY 2016/17**

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
Michelle Sinclair, Coordinator of Professional Development

	Audited Actuals 2015/16 As of 6/30/16	Adopted Budget 2016/17 As of 7/1/16	2nd Interim Budget 2016/17 As of 1/31/17	Unaudited Actuals 2016/17 As of 6/30/17	2nd Interim Budget vs. Unaudited Actuals 2016/17
REVENUE	799,677	793,595	792,440	801,754	9,314
EXPENDITURES					
Certificated Salaries (1) (2)	569,439	654,940	649,656	603,539	(46,117)
Employee Benefits (1) (2)	138,951	170,651	158,008	151,527	(6,481)
Unallocated Reserve	0	28,109	42,036	0	(42,036)
Services & Other Operating Expenses	29,648	37,000	41,000	21,757	(19,243)
Indirect Costs	48,268	57,094	57,094	49,794	(7,300)
TOTAL EXPENDITURES	786,306	947,794	947,794	826,617	(121,177)
NET INCREASE (DECREASE)	13,371	(154,199)	(155,354)	(24,863)	130,491
FUND BALANCE ANALYSIS					
Beginning Fund Balance	216,385	229,756	229,756	229,756	0
Net Increase (Decrease) in Fund Balance	13,371	(154,199)	(155,354)	(24,863)	130,491
Ending Fund Balance	229,756	75,557	74,402	204,893	130,491

Notes

- (1) \$30,000 for Teacher Initiated Professional Development is included in the salary, benefits and services and other operating expenses.
- (2) Savings from vacant positions, hourly work and stipends

ANNUAL REPORT OVERVIEW: FY 16-17

professional development, provide data analysis, and for professional development. BSEP funds were also used for hourly work and stipends to compensate staff for summer professional development and data work.

STATUS REPORT

Following is a summary report of the activities accomplished with this BSEP Resource during FY 16-17. Additional activities funded through other sources are not detailed in this report.

<u>Professional Development / Training Delivered by BREA Staff</u> ⁴	<u>Number of Trainees</u>
● 7 Illuminate Assessment System days	~20-25 per training
● 11 Site-Level K-5 Data-Cycle sessions	~50 total, as needed by sites
● Site-Level Survey Set-Up / Evaluation	~45 total (SGC by Site)
● 10 BHS data, administrative and intervention sessions	~75 total
● 10 Management (Data-Cycles / LCAP / Illuminate)	~30 per training
● Site Based Professional Development / Support	14 Sites, 1 to 2 times/ week
● Collaboration with RTI and Restorative Justice Staff to create new tools in Illuminate to monitor interventions	~50 total

District Assessment Support: Provided 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.

This is the fifth year a Kindergarten Universal Screener was conducted and Kindergarten staff also assessed students in ELA. There was a re-introduction of Music Assessments in Grades 4 and 5. In addition, the high school conducted common assessments in Mathematics, World Language, Social-Science and Science. The BREA team supported:

- Assessment technical design and Analysis using:
 - *A Story of Units/ Ratios for K-8 Math;*
 - *Teachers’ College Reading and Writing Project (TCRWP) for K-5 English Language Arts .*
 - *Middle School STAR360 Reading;*
 - the other K-12 teacher-leader developed assessments listed above;
- Assessment creation in *Illuminate* so teachers can enter data and access results;
- Duplication and distribution of Assessment Booklets and Scan Sheets / Rubrics for rest 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;
- SQL, PowerPoint and Excel used by the Director and Data Technician to produce the Assessment Reports for the Educational Services teams, instructional leaders and support staff (see below for full list of reports)

⁴ (Contracted software / systems paid for by BSEP funds such as *Illuminate, Key Data Systems, and SQL* are listed by name.)

ANNUAL REPORT OVERVIEW: FY 16-17

Assessment Development: Organized and facilitated meetings with ELA and math teacher leaders to review Common Core aligned assessments and plan revision of assessments for Grades 6-8 Mathematics.

Elementary Report Cards: Updated K-5 Elementary Report Cards to further align to the Common Core State Standards and Berkeley curriculum including the update of teacher and family guides (in English and Spanish) for use with the Report Cards, the revision of the Toolbox Social-Emotional guide and the creation of a pilot Report Card for English Learners.

School Principal Support: All 18 Principals, including PreK, Independent-Study and Berkeley Technology Academy, received one-on-one support at their school sites on a regular basis (at least bi-weekly). 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 Governance Council (SGC),
- Supporting principals and support staff (Literacy Leaders, Math Teacher Leaders, Response to Intervention Staff, English Learner Staff, etc.) in using Common Core / SBA data, *Illuminate*, *Survey Monkey* or *PowerSchool* to inform instructional decision-making,
- Support of the Office of Family Engagement and Equity (OFEE) in monitoring family engagement.

In 16-17, all schools received support in the transition to Year 3 of both the LCAP (Full-Implementation) and *Smarter Balanced Assessments*. BREA staff provided support to Principals to ensure they have a better understanding of *Illuminate* so that students are receiving culturally-responsive interventions, English Language Development and/or social-emotional supports, enrichment and extensions.

Reports: Provided reports both electronically and in paper copy for the School Board, District Administrators, and Schools designed to both review data and access actionable insights designed to help stakeholders improve student, school and district performance:

- 15 School Board Data Presentations
- 17 District and School Information Sheets (in English and Spanish)
- 18 Data Presentations for SGC or SSC and School Staff (all schools)
- K-9th Grade ELA and Math Class Profile and Case Management reports in *Illuminate* by Classroom / Subject-Area classrooms and accessible by Role
- 20 District Assessment Summary reports
- Survey implementation and analysis support for SGCs, Unions and Staff *We Care* surveys. These surveys used the BREA Survey Monkey tool.

High School WASC, Career and College Readiness and Interventions Support: Trained High School TSAs on *Illuminate* and provided data presentation summaries for use with WASC accreditation at Berkeley Technology Academy. Provided on-going data and evaluation for the Berkeley High School Redesign and Intervention teams. Developed a course-design plan and on-

ANNUAL REPORT OVERVIEW: FY 16-17

going support for Career and College Pathways and Career Technical Education support.
Introduced a Student Assessment

2020 Vision / LCAP / District Indicators for Equity: Director D'Angelo participated with Director of Programs and Special Projects Dr. Pat Saddler in the linking between the 2020 Vision, LCAP and District Indicators to ensure an on-going evaluation of instructional and social-emotional supports for students. In addition to the LCAP Evaluation, the Director oversaw all quantitative and summative evaluation of LCAP Goals in alignment with BSEP, 2020 and District Goals to assure that there is a systematic Research, Evaluation and Assessment program.

Elementary to Middle; Middle to High-School Transition Rubrics

Developed a transition rubric for teachers in Grades 5 and 8 to complete in Illuminate so that when students transition to Middle and High School, the school is able to not only review the students' local and state assessment results but an overview of a students' readiness both academically and socially. The rubric also ensured that students were referred to additional resources for economic, health or other specific areas indicated in the Rubric.

Support for the Transition to the Illuminate Student Information System

As BUSD transitioned from PowerSchool to Illuminate to monitor all areas of student information including Secondary Grading, Attendance, Discipline, Master Scheduling and Enrollment, the Data Analyst and BREA TSAs (when needed) were released from regular duties (listed above) to provide support to the Technology department and to the sites to ensure a smooth transition.

Progress on 2016-17 Smart Goals

A. Illuminate Goal: For 2016-17, the goal was to have 100% of staff access *Illuminate* and identify students needing intervention, as well as those needing to expand their learning; create and analyze formative and summative assessments; use the inquiry process to evaluate student learning through the rigorous use of data.

Result: 100% of staff have received training in Illuminate and are using Illuminate to inform practice.

Next Steps: Further training on Illuminate now that the ISI (Student Information System) has been introduced.

B. Professional Learning Community Goal: For 2016-17, the goal was to have BREA staff members partner with the Professional Learning Community (PLC) team leaders in Inquiry sessions to guide sites to look at their achievement gaps and use the most current data to reflect upon teaching and learning.

Result: The BREA meetings transformed from a regular business / sharing meeting to a working Professional Learning Community which informed their work with PLCs at each site. There were a total of 1-3 working PLCs at each site and department and BREA participated as primary members of the EL PLC, RTI PLC, Lit Coach PLC, Site PLC (16), OFEE PLC, RJ PLC and the LCAP PLC.

ANNUAL REPORT OVERVIEW: FY 16-17

Next Steps: The BREA TSAs will be using the BREA PLC as action research and are working with Principals and Departments to identify PLCs that need further assistance in norms, data-review and/or establishing the PLC to be both systematic and culturally responsive.

**BERKELEY UNIFIED SCHOOL DISTRICT
 BERKELEY SCHOOLS EXCELLENCE PROGRAM (BSEP)
 EVALUATION (Measure A, Resource 0856)
 Revenue and Expenditures
 Annual Report FY 2016/17**

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 Managers: Pasquale Scuderi, Assistant Superintendent for Educational Services
 Debbi D'Angelo, Director of Evaluation and Assessment

	Unaudited Actuals 2015/16 As of 6/30/16	Adopted Budget 2016/17 As of 7/1/16	2nd Interim Budget 2016/17 As of 1/31/17	Unaudited Actuals 2016/17 As of 6/30/17	2nd Interim Budget vs. Unaudited Actuals 2016/17
REVENUE	621,972	617,240	616,342	622,994	6,652
EXPENDITURES					
Certificated Salaries	290,004	340,325	334,776	306,420	(28,356)
Classified Salaries	106,963	117,964	120,708	116,895	(3,813)
Employee Benefits	90,186	123,307	107,540	101,535	(6,005)
Books & Supplies	1,094	9,000	6,200	3,100	(3,100)
Equipment	0	0	2,800	2,759	(41)
Unallocated Reserve	0	34,204	42,776	0	(42,776)
Services & Other Operating Expenses	55,873	64,000	74,000	58,372	(15,628)
Indirect Costs	35,585	44,152	44,152	37,760	(6,392)
TOTAL EXPENDITURES	<u>579,705</u>	<u>732,952</u>	<u>732,952</u>	<u>626,841</u>	<u>(106,111)</u>
NET INCREASE (DECREASE)	42,267	(115,712)	(116,610)	(3,847)	112,763
FUND BALANCE ANALYSIS					
Beginning Fund Balance	113,745	156,012	156,012	156,012	0
Net Increase (Decrease) in Fund Balance	42,267	(115,712)	(116,610)	(3,847)	112,763
Ending Fund Balance	156,012	40,300	39,402	152,165	112,763

Services and other operating expenses was budgeted for \$30,800 in 2016-17. Only \$11,452 was used, leaving a balance of \$19,348. With a structural deficit in this program, reducing costs where possible was necessary to ensure funding staff salaries for the 2017-18 school year. To continue to provide a high level of service to our families, other sources of funding, including a BPSF grant, school site funds and community donations and collaborations have been sought to support ongoing Family Engagement programs.

STATUS REPORT

The Family Engagement and Equity Specialists reported making personal connections with approximately one thousand families, representing over four thousand individual contacts during the 2016-17 school year. The team focused on the target population of underserved families and supported the District with ongoing parent engagement activities and training. In addition to many site level parent engagement activities, OFEE was instrumental in providing a four-part districtwide parent education workshop series, our annual Why 9th Grade Matters welcome and parent training, a screening the documentary Screenagers, college and career readiness and financial aid workshops, workshops around race and racism, and immigration forums and clinics with legal support to empower immigrant families and our school communities.

The Office of Family Engagement and Equity model of Family Engagement is consistent with the Dual Capacity Building Framework developed by Karen Mapp in collaboration with Harvard University. Three members of our team attended the annual Family Engagement Conference where Karen Mapp taught and inspired the implementation of strategies and development of parent trainings for our district. The supervisor attended the two week Family Engagement Course at the Harvard Business Graduate School in Cambridge to strengthen the foundation of family engagement in BUSD.

OFEE is working to build the capacity of staff and families to support the academic and socioemotional advancement of students from our target families. OFEE supports certificated and classified school staff with training (at staff meetings) and informally, to supported school staff with understanding the challenges of target families from diverse cultural, racial, religious, economic and linguistic backgrounds.

Family Engagement Specialists were tasked with working with target families based on chronic absenteeism, academic performance, and behavior. OFEE worked closely with families on attendance during the 2016-17 school year, and encouraged early detection and intervention when students miss school. As a result, more students were brought to the Student Attendance Review Board earlier in the year, allowing time for intervention and getting on track. OFEE was also successfully communicated the opinion that attendance is a responsibility of the school, and that attendance committees which included site administrators, teachers, and classified staff are needed for increased effectiveness. As a result, most school sites now have attendance teams (OFEE on the team) and many are seeing improvements.

BSEP ANNUAL REPORT: FY 2016-17

The OFEE team provided parent education, outreach, and coordinated, collaborated, facilitated, initiated and implemented groups, workshops and programs at school sites and at the District level. Consistent themes and needs in our district included: attendance, need for housing and food, special education and overrepresentation of African Americans, and supporting guardians in meetings with school and District staff.

Activities in 2016-17 included:

- K-to-College School Supply and dental hygiene Give-Away which reached more than 1,000 socio-economically disadvantaged families in September 2016
- Attendance Awareness Month Celebrations at every elementary, middle and BHS in September 2016
- College Readiness and Financial Aid Clinics in October, 2016, March 2017
- 9th Grade Matters - Personal welcome and school and district navigation workshops for target 9th grade students and families. This event was well attended.
- Kinder Fair parent outreach
- Four-part Parent Education and Leadership Training (11/22, 1/21, 3 /4, 4/29, 2017) - Parent Champion These workshops addressed the history and policies race, gender and nationalism that create obstacles to educating children of color. Understanding the educational system, navigating the educational institutions with confidence, and parents were learned to create an action plan for their children's education and future.
- BUSD Cesar Chavez and Dolores Huerta Visual Arts and Essay Contest and Celebration April 2017
- Screenagers - Documentary screening and the film director Q&A about the impact of screen time on youth. Parents and students committed to less screen time.
- Supported schools with outreach and developing parent leaders for ELAC and DELAC
- Middle School and High School transition meetings for seamless transitions for our most vulnerable students and families
- PowerSchool support ongoing parent education
- Back to School Night and Open House outreach; worked with schools to provide childcare
- Parent Teacher Conference outreach and bridge communication gaps for families and staff when needed

BSEP ANNUAL REPORT: FY 2016-17

- Educate and support for families of students with IEPs (Individual Educational Plan for special education students) or 504 (Child Education Accommodation) plans.
- Immigration Forums, workshops, and legal support for our immigrant families in November 2016 and January 2017
- Food Pantries at most elementary schools and BHS.
- Partnered with McKinney-Vento Coordinator to support homeless families with food, clothing, housing, student enrollment, and communicating with school staff.

As Berkeley continues to gentrify, many low income families are becoming displaced and seeking basic needs such as food, shelter, mental health and medical support. OFEE is collaborating with the District Nurse and the City of Berkeley to customize the Family Information and Navigation Desk (FIND) online tool that is currently used by Children's Hospital to bridge the inequities in health care by identifying appropriate resources and supports for families. When using this tool, Family Engagement staff will quickly access customized lists of resources for families based on their unique needs.

Progress on 2016-17 SMART Goals

Goal #1.

Form a Family Engagement Advisory Committee made up of stakeholders, including parents/guardians, community partners and district leaders and staff.

Result: Forming a district level advisory committee that has a strong parent/guardian base is our goal. This was difficult to do without starting with site committees. The OFEE team has been tasked with coordinating Family Engagement Advisory Committees at their sites, and the representatives from these committees will form the base for the district committee. We have three community partners and district administrators who are ready to join this committee. We have a goal of coming together in March 2018.

Goal #2.

Train at least five parents and staff at every school in a program such as the "Parenting Partners Program" in order to build capacity for family engagement.

Result: The OFEE team decided to develop its own BUSD customized parent education program to support and build the capacity of parents and staff. After careful research and cost estimates to purchase packaged parenting programs to bring to our district, we decided to go in a different direction. The cost of Parenting Partners and other similar programs was between three and five thousand per site, and this did not fit our budget. The cost was not the only reason we did not use a package program for parent development. The programs did not fit the diversity we have in Berkeley, which is not only racial, but includes education, levels of awareness, and abilities to

partner, support and advocate for student success and socioeconomic status. Our parent training takes Berkeley's uniqueness into consideration.

We piloted our customized OFEE Parent Education training with our Ramp Up Saturday School parents beginning October 2017, and it has been well received. We are also offering and scheduling relationship and partnership development training to school site staff and parent groups.

Goal #3.

Engage at least two parents from each school in a Latino Family Affinity Group, with meetings at least monthly, and one retreat, using a framework such as PIQE.

Result: Immigration was the focus in 2016-17. Although we know that all Latinos are not immigrants, many needed legal, emotional and advocacy support. In response to this shift, OFEE focused on gathering information, and making sure families know their rights. Also, as with the Family Engagement Advisory, we have come to understand that developing site affinity groups before district-wide connections makes sense. Specialists are tasked with identifying one or two Latino parents/guardians to assist them with bring together other Latino families. The OFEE Parent training (focused on helping parents to tell their stories in their affinity group) will be used to strengthen families at the site.

**BERKELEY UNIFIED SCHOOL DISTRICT
 BERKELEY SCHOOLS EXCELLENCE PROGRAM (BSEP)
 PARENT OUTREACH (Measure A, Resource 0857)
 Revenue and Expenditures
 Comparison Report FY 2016/17**

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: Susan Craig, Director of Student Services
 Ann-Marie Callegari, Supervisor of Family Engagement and Equity

	Audited Actuals 2015/16 As of 6/30/16	Adopted Budget 2016/17 As of 7/1/16	2nd Interim Budget 2016/17 As of 1/31/17	Unaudited Actuals 2016/17 As of 6/30/17	2nd Interim Budget vs. Unaudited Actuals 2016/17
REVENUE	308,518	306,171	305,725	309,025	3,300
EXPENDITURES					
Staff	188,417	244,086	248,404	234,769	(13,635)
Employee Benefits	66,735	92,970	107,105	102,286	(4,819)
Books & Supplies	983	4,000	4,000	1,176	(2,824)
Equipment	0	0	0	0	0
Unallocated Reserve	0	13,144	3,243	0	(3,243)
Services & Other Operating Expenses	10,905	29,000	30,800	11,452	(19,348)
Indirect Costs	17,464	24,563	25,211	22,415	(2,796)
TOTAL EXPENDITURES	284,504	407,763	418,763	372,098	(46,665)
NET INCREASE (DECREASE)	24,014	(101,592)	(113,038)	(63,073)	49,965
FUND BALANCE ANALYSIS					
Beginning Fund Balance	229,716	253,730	253,730	253,730	0
Net Increase (Decrease) in Fund Balance	24,014	(101,592)	(113,038)	(63,073)	49,965
Ending Fund Balance	253,730	152,138	140,692	190,657	49,965

SCHOOL LIBRARIES
(BSEP Measure A, Resource 0860)

OVERVIEW for FY 2016-17

Purpose

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.¹

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

Certificated Salaries

Budget: \$745,734 *Actual: \$ 705,510* *Variance:(\$40,224)*

- 3 Middle School Teacher Librarians 3.0 FTE
- 2 High School Teacher Librarians 2.0 FTE
- Continuation High School Librarian 0.6 FTE
- TSA Elementary Teacher Librarians 1.6 FTE
- District Library Coordinator 1.0 FTE

Classified Salaries

Budget: \$564,408 *Actual: \$573,864* *Variance: \$9,456*

- 11 Elementary Library Media Technicians 9.5 FTE
- 3 Middle School Library Media Technicians 1.86 FTE
- Central Media Library Technician 0.8 FTE
- High School Library Media/Textbook Technician 0.8 FTE

Employee Benefits

Budget: \$490,348 *Actual: \$479,919* *Variance: (\$10,429)*

Books, Supplies and Equipment

Budget: \$86,658 *Actual: \$79,390* *Variance: (\$7,268)*

Services and Other Operating Expenses

Budget: \$34,625 *Actual: \$36,676* *Variance: \$2,051*

Indirect Costs

Budget: \$123,857 *Actual: \$120,210* *Variance: (\$3,647)*

Fund Balance

¹ BSEP Measure A, Section 3.B.ii.

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Beginning: \$312,723

Ending: \$109,499

Decrease: \$203,224

RESOURCE SUMMARY

In FY 2016-17, actual revenue and expense for this Resource was very close to the budget proposed in the plan with the exception of over-budgeting for Certificated salaries due to a unique logistical challenge of two librarians being on Reduced Workload at the same time as another was on maternity leave. Revenue in FY 2016/17 was slightly higher than budgeted.

As the initial fund balance was projected to be so low at \$14,252, and the budget forecast for 2017/18 started to generate questions about further budget cuts needed, library expenses were further reigned in wherever possible. In the end, we wound up with a much healthier fund balance of \$109,499.

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. The library lens of the 2020 Vision focuses commitment on developing skilled thinkers and learners throughout the entire Berkeley school community with continual mindfulness about diversity in characters, themes, authors and illustrators. Following are highlights from FY 2016-17.

Solid support for a culture of reading

Our BUSD libraries promote a strong reading culture with print and digital resources aligned to curricular assignments, as well as reader interest and initiative. Over 267,000 items were circulated in the K-12 schools in 2016-17, more or less on par with the previous year. The reduced allocation of \$7 per pupil for library books and materials, combined with some one-time central funding at ~\$3/student, allowed the program to address the broad range of reading levels and interests of students and staff.

The Mock Newbery program exploded from its early success at Emerson to be at all 11 elementary schools. A strong collaboration between the site Library Media Specialists, Literacy Coaches and Berkeley Public Library staff made book buzz really come alive at school and at home! The middle school libraries often run additional book clubs, as well as the Battle of the Books, with the Grand Finale doubling in size in its second year. Coding clubs, low-tech makerspaces, and other programming welcomes all interested to pursue their passions.

Our preschoolers made good use of the Preschool Book Bag Lending Library at each of our three child development centers. The Preschool Book Bag staff continued with consistent morning and afternoon hours, ensuring that all students had a weekly opportunity to hear an additional story and exchange a book for home reading. We also hosted World Read Aloud Day at our three preschools in mid-February, with Guest Readers from the community and even a Llama wearing red pajamas!

The BEARS Summer School Library program continued in the summer of 2017, with a Library Media Specialist at all three BEARS/EDC summer school sites (this past year at Leconte, Rosa Parks and Washington) for fifteen hours per week at each site, a total of 45 hours per week for

five weeks. This program supports the focus on literacy, helping mitigate against the common “summer slide.”

Library Staff

Many site library staff serve on school committees, and a number are recognized leaders in the school library field, serving on regional and national boards and presenting at conferences. All are dedicated to serving our 9,500+ students and families with a hearty embrace of reading and learning across the disciplines, with a reasonable dose of technology to boot. The Elementary Teacher Librarians on Special Assignment continued to support site Library Media Specialists and Classroom Teachers, wearing both their Librarian and DigiTech hats.

Information Literacy Instruction

The teacher librarians throughout the district provide direct instruction in research skills and information literacy. The high school librarians regularly collaborate with classroom teachers to guide students’ use of online databases and research protocols. At the middle school level, the three teacher librarians contributed lessons to a collective library curriculum resource, and included collaboration with classroom teachers in all disciplines. As the elementary teacher librarian staffing was 1.6 District-based TSAs, more direct instruction was added to many elementary class library visits. This is especially important in the upper grades with audiobooks, curated online resources, targeted book lists, and digital citizenship instruction.

Instructional Technology

The District Library Coordinator and TSA Teacher Librarians are members of the DigiTech Instructional Technology department, a natural alignment of library information literacy skills and tech integration throughout the learning cycle. With all of our focus on tech skills, our intention to continue a *balanced* approach to the use of technology remains strong.

Community Collaboration

Our libraries host many events beyond the hundreds of student visits every week. Authors and illustrators love visiting Berkeley Schools, both in person and via Google Hangouts/Skype! We display student art and science projects; provide space for music classes and vision screening; host meetings for staff, PTA, ELAC, SGC; support the Rotary Club’s third grade Dictionary Distribution; and actively collaborate with the Berkeley Public Library. “All are welcome here.”

**BERKELEY UNIFIED SCHOOL DISTRICT
 BERKELEY SCHOOLS EXCELLENCE PROGRAM (BSEP)
 LIBRARY PROGRAM (Measure A, Resource 0860)
 Revenue and Expenditures
 Comparison Report FY 2016/17**

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, Assistant Superintendent for Educational Services
 Becca Todd, District Library Coordinator

	Audited Actuals 2015/16 As of 6/30/16	Adopted Budget 2015/16 As of 7/1/15	2nd Interim Budget 2015/16 As of 1/31/16	Unaudited Actuals 2016/17 As of 6/30/17	2nd Interim Budget vs. Unaudited Actuals 2016/17
REVENUE	1,789,402	1,775,790	1,773,205	1,792,345	19,140
EXPENDITURES					
Certificated Salaries	667,071	670,705	745,734	705,510	(40,224)
Classified Salaries	542,556	588,948	564,408	573,864	9,456
Employee Benefits	406,651	480,033	490,348	479,919	(10,429)
Books & Supplies	167,905	77,583	81,658	77,487	(4,171)
Equipment	4,892	5,000	5,000	1,903	(3,097)
Unallocated Reserve	0	39,931	15,467	0	(15,467)
Services & Other Operating Expenses	58,644	38,700	34,625	36,676	2,051
Indirect Costs	120,841	121,848	123,857	120,210	(3,647)
TOTAL EXPENDITURES	1,968,560	2,022,748	2,061,097	1,995,569	(65,528)
NET INCREASE (DECREASE)	(179,158)	(246,958)	(287,892)	(203,224)	84,668
FUND BALANCE ANALYSIS					
Beginning Fund Balance	491,881	312,723	312,723	312,723	0
Net Increase (Decrease) in Fund Balance	(179,158)	(246,958)	(287,892)	(203,224)	84,668
Ending Fund Balance	312,723	65,765	24,831	109,499	84,668

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 funds that provide 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 Governance Councils make decisions about technology needs and purchases.

Until the passage of the Measure I facilities bond in November 2010, there were no District monies outside of BSEP for the purchase of network infrastructure and other technology. Measure I has provided funds for installing wireless throughout the District. Currently, Measure I provides \$523,000 per year through 2019-20 to improve District technology infrastructure. In 2016-17, 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 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 school techs provided by BSEP, significantly furthered the use of technology in classrooms as well as provided the means for the District to perform well on the Smarter Balanced Assessments (SBA) in all 3-8 grade classrooms, and grade 11 at Berkeley High School and the Berkeley Technology Academy (BTA).

One major accomplishment of 2016-17 was the work of a planning group of middle school teachers, principals and staff, chaired by the Instructional Technology Coordinator Allison Krasnow and the Library Coordinator Becca Todd. The workgroup agreed on a framework for:

- Schools committing to Digital Citizenship lessons based on Common Sense Media materials
- Teachers (grades 6) committing to becoming Google Certified Educators
- Teachers agreeing to use technology for certain projects in the 3rd-4th-5th grade curriculum
- District agreeing to provide Chromebook carts so students have a Chromebook available in each 4th and 5th grade and one cart for every two 3rd grade classrooms.

When we offered this program to schools in spring of 2016, we were pleasantly surprised that all 11 elementary schools decided to participate in the plan. In all, 70 of our elementary educators (primarily grade 3-5 teachers, but also literacy coaches, resource teachers, principals, etc.) are Google Certified and another 30 followed alternative methods to achieve the same Professional Development.

In 2016-17, the technology department added two vital leadership positions: a Technology Supervisor who supervises the seven Computer Technicians based in the schools, including the Adult School, and the Instructional Technology Coordinator who leads the curriculum and school-based work of teachers integrating technology into their daily practice. The Technology Supervisor position was filled in October 2015. The Instructional Technology Coordinator position was filled July 1, 2016.

Combined, these two positions along with existing staff and the Tech Teacher Leaders have created a strong leadership team to move Berkeley schools forward using technology in the classroom. Planning is moving forward this year on how to approach 1:1 access for students in 7th grade classrooms next year, and how to make better use of existing and additional Chromebook carts in secondary schools in 2018-19.

Unfortunately, the Instructional Technology Coordinator position is funded from one-time Common Core funding and will be eliminated June 30, 2018.

Progress on 16-17 Smart Goals:

1. All 3rd-5th grade teachers will learn to integrate Google Classroom at a staff meeting in September, led by their Technology Teacher Leader.

Result: This goal was met.

2. By September 2016, all 3rd-5th grade classrooms will have a 2:1 ratio of Chromebooks per student, with 1 cart shared between 2 classrooms. In 4th and 5th grades, teachers who have become Google Certified Educators, will have additional Chromebooks for a 1:1 student to device ratio.

Result: This goal was met.

Additionally, at least 75 K-12 teachers will attend the DigiTech August Institute with workshops led by BUSD teachers.

Result: The plan changed — instead of all teachers, a secondary math August Institute was held. 36 teachers attended.

3. At least 70% of 3rd-6th grade teachers will become Google Certified Educators (or pass the Berkeley Alternative Certification) by September 2016.

Result: In actuality, all but two teacher grades 3-5 are Google Certified, and those two are new teachers who have committed to finishing by Winter Break. Sixth grade teachers are also 100% Google Certified.

4. All 8th grade teachers will have a 2:1 ratio of students to Chromebooks, and will use technology weekly with students.

This goal is being met.

5. At least 75% of middle school math and 6th grade science teachers will attend STEM-focused professional development in August 2016. *See goal 3.*

**BERKELEY UNIFIED SCHOOL DISTRICT
BERKELEY SCHOOLS EXCELLENCE PROGRAM (BSEP)
TECHNOLOGY (Measure A, Resource 0862)
Revenue and Expenditures
Annual Report FY 2016/17**

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

	Unaudited Actuals 2015/16 As of 6/30/16	Adopted Budget 2016/17 As of 7/1/16	2nd Interim Budget 2016/17 As of 1/31/17	Unaudited Actuals 2016/17 As of 6/30/17	2nd Interim Budget vs. Unaudited Actuals 2016/17
REVENUE	799,677	793,595	792,440	800,993	8,553
EXPENDITURES					
Certificated Salaries (1)	39,289	73,206	70,030	60,236	(9,794)
Classified Salaries (2)	394,270	462,431	447,211	456,651	9,440
Employee Benefits (1)	177,254	226,848	224,218	220,956	(3,262)
Materials, Supplies & Equipment	71,603	60,000	88,700	74,204	(14,496)
Unallocated Reserve	0	13,415	4,479	0	(4,479)
Services & Other Operating Expenses	8,606	0	15,300	13,990	(1,310)
Indirect Costs	45,193	53,581	54,543	52,949	(1,594)
TOTAL EXPENDITURES	736,215	889,481	904,481	878,986	(25,495)
NET INCREASE (DECREASE)	63,462	(95,886)	(112,041)	(77,993)	34,048
FUND BALANCE ANALYSIS					
Beginning Fund Balance	67,658	131,120	131,120	131,120	0
Net Increase (Decrease) in Fund Balance	63,462	(95,886)	(112,041)	(77,993)	34,048
Ending Fund Balance	131,120	35,234	19,079	53,127	34,048

Notes

(1) Certificated Salary savings from vacant Technology TSA position

(2) New Technology Services Supervisor position created and partially funded by this Resource. Director and Student Systems Specialist moved to the General Fund.