Berkeley PUBLIC SCHOOLS

BSEP & BERRA
CCEIS
P&O
AASAC
Multilingual Learner Master Plan
DELAC
SPSA
ELAC
CCEIS Ed Partners
LCAP
SSC
PAC
African American Success
Literacy Action Plan
GESHAC
SBAC
Strategic Plan
EAC

BUSD Joint Committee Meeting
March 7, 2024

Excellence • Equity • Engagement • Enrichment

ENIKIA FORD-MORTHEL
Superintendent
Berkeley Unified School District

BOARD OF EDUCATION

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Board President
Berkeley Unified School District

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Berkeley Unified School District

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Director
Berkeley Unified School District

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Director
Berkeley Unified School District

MIKE CHANG
Director
Berkeley Unified School District

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Our Mission

Enable and inspire our diverse student body to achieve academic excellence and make positive contributions to our world.

Excellence

Equity

Engagement

Enrichment

EXCELLENCE | EQUITY | ENGAGEMENT | ENRICHMENT

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Berkeley Unified School District

Advisory committees serve the Berkeley Unified School District in an *advisory* capacity on matters pertaining to various aspects of the district plans and budgets in collaboration with district staff and other committee members. The scope of which varies depending on committee (see District Training Committee Resource Website)

- ❏ Liaison and represent your school communities, etc on the committees
  - ❏ Share Information
- ❏ Focus on advisement and collaboration with district staff
- ❏ Review and monitor implementation of respective plans, budget and implementation/impact metrics
- ❏ Provide recommendations (to principals, district staff, and/or the Superintendent), as appropriate

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Objectives

Build collective capacity of advisory committee members to:

...Function in their role as thought and accountability partners to BUSD

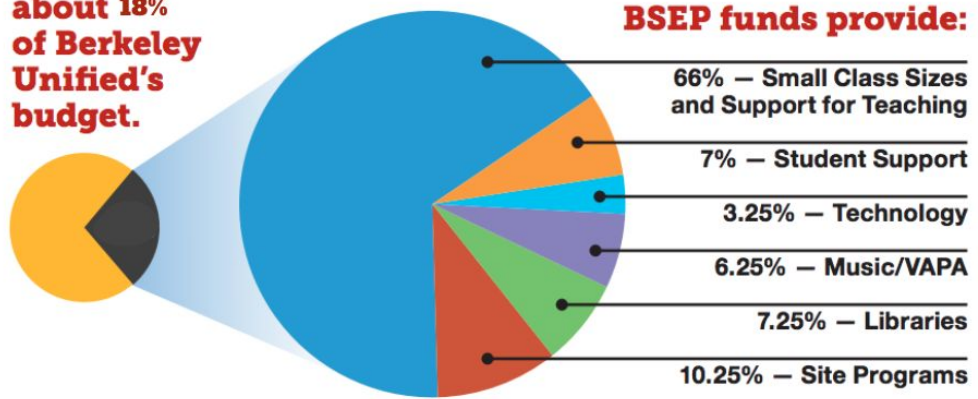*...Focus on advisement and collaboration with district staff*

Agenda

6:00 - 6:10   Welcome and Opening Moves
- Recap and Review
- Connector
- Review Feedback from February Meeting

6:10 - 6:20   Update on BUSD Budget Landscape
- Highlights of 2nd Interim Report
- BUSD Budget Reduction Strategies

6:20 - 6:50   An Exercise towards Continuous Improvement
- Explore implications for district and district advisory Committees
- Align on advisory strategies during budget season

6:50 - 6:55   Feedback Survey, Preview of Coming Attractions, & Transition

6:55 - 7:00   Next Steps and Closing Moves

BSEP ⭐ Excellence!

BUSD can continue its strive towards EXCELLENCE for our babies because of you!

BSEP is about 18% of Berkeley Unified's budget.

BSEP funds provide:

66% — Small Class Sizes and Support for Teaching

7% — Student Support

3.25% — Technology

6.25% — Music/VAPA

7.25% — Libraries

10.25% — Site Programs

Thank you Berkeley Voters!!!

1/18/24 Meeting Feedback and Follow up:
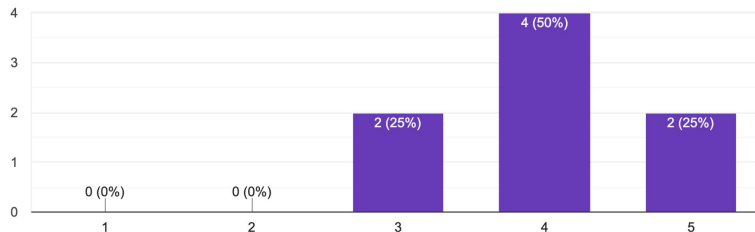
8 out of 20 participants responded

Meeting Successes

"Multi-level communication"

"Clear explanation of the budget and how BUSD is impacted"

"Opportunity to ask questions"

How well did we meet today's objective to Consider implications for respective committee (Program & Plans) ¿Qué tan bien cumplimos nuestra meta d... nuestro comité respectivo (programas y planes)?
8 responses

Rating	Count
1	1 (12.5%)
2	4 (50%)
3	1 (12.5%)
4	2 (25%)
5	0 (0%)

How well did we meet today's objective to Understanding budget outlook for BUSD - Highlights from the Governor's Budget? ¿Qué tan bien cumplimos ...SD y el resumen del presupuesto del gobernador?
8 responses

Rating	Count
1	0 (0%)
2	0 (0%)
3	2 (25%)
4	4 (50%)
5	2 (25%)
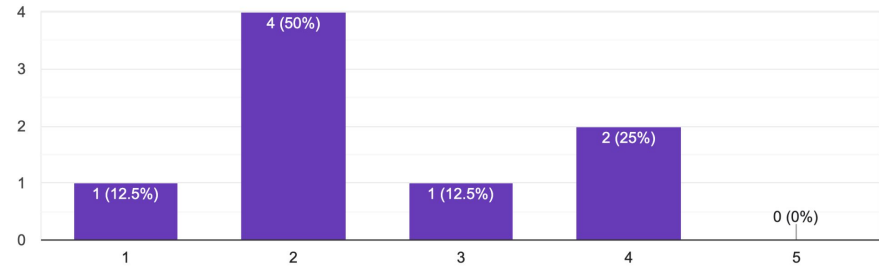
Suggestions
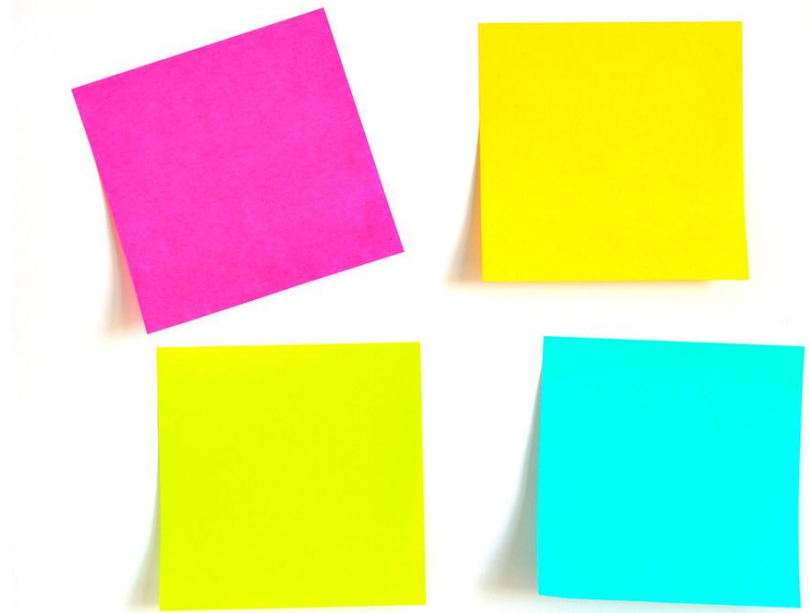
"Invite more people"

"Keep time for breakout groups"

"Extend meeting to 90 mins"

"Hold Questions or use chat"

Parking Lot Jamboard

Advisory Committee Breakouts Facilitators

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Jill Hoogendyk
*Associate Superintendent of
Berkeley Unified School
District*

Dr. Mathew Espinosa-Castro
*Director of Equity,
Achievement
& Belonging*
AASAC & CCEIS

Shawn Mansager
*Executive Director of Special
Education*

Danielle Perez
BSEP Program Specialist
SSC

Liza Estupin
*Director of Categorical
& Special Projects*
PAC

Kathy Fleming
*Director of Local Resources &
Partnerships*
P&O, SSC

Jasmina Viteskic
*District Title IX
Coordinator/Compliance Officer*
GESHAC

Chris Albeck
*Director of Curriculum
& Instruction*
DELAC

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Build collective capacity advisory committee members to function in their role as thought and accountability partners to BUSD

...Function in their role as thought and accountability partners to BUSD
...Focus on advisement and collaboration with district staff

❖ Implications for your work as an advisory committee
❖ Implications for your committee's program and/or plans
❖ Other questions
❖ BIG TAKE AWAY (to share out)

Track your thoughts **here**

Group members:		
Implications for your work as an advisory committee	**Implications for your committee's program and/or plans**	**Other Questions**
Big TakeAway:		

Committee **NoteKeeper**

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BUSD Fiscal Forecast:
2024-25 Budget Landscape

Pauline Follansbee
Assistant Superintendent of Business Services
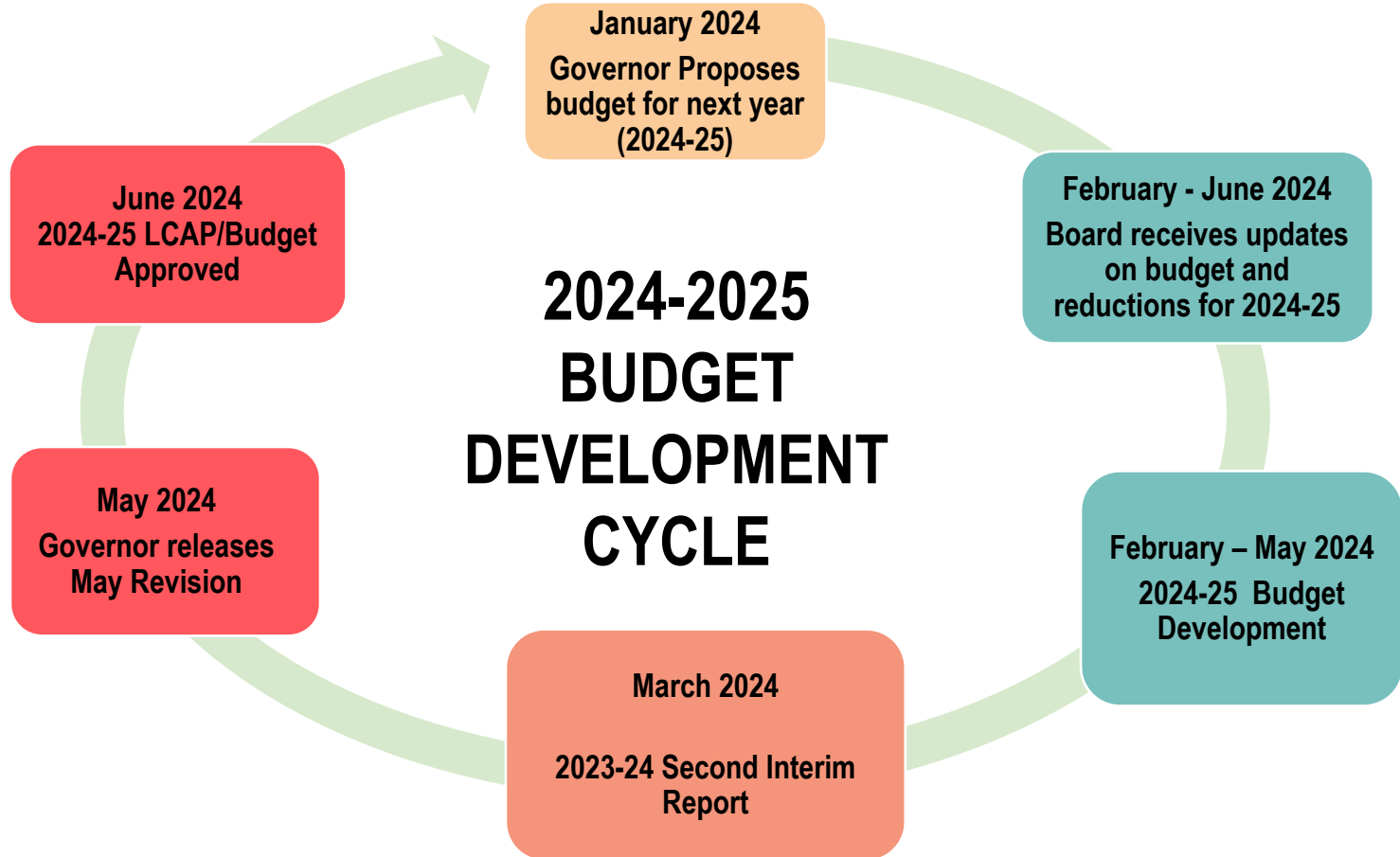
Emily Mayer
Executive Director of Fiscal Services

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❏ Positive Certification. BUSD is maintaining a positive ending fund balance for the current year and two subsequent years. However, budget reductions are necessary to have a positive certification.

❏ Alameda County Office of Education is requiring formal recognition of the budget reductions by the board

❏ Additional budget reductions will be necessary to address the District's structural deficit

❏ Increased Unduplicated Pupil Count, reduced enrollment based CALPADS

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NAVIGATING THE BUDGET CYCLE PROCESS

2024-2025 BUDGET DEVELOPMENT CYCLE

January 2024
Governor Proposes budget for next year (2024-25)

February - June 2024
Board receives updates on budget and reductions for 2024-25

February – May 2024
2024-25 Budget Development

March 2024
2023-24 Second Interim Report

May 2024
Governor releases May Revision

June 2024
2024-25 LCAP/Budget Approved

Unrestricted General Fund (in millions)	2023-24	2024-25	2025-26
Expenditures	-111.3	-113.3	-116.1
Budget Adjustments		*6.0*	*8.6*
TOTAL EXPENDITURES	-111.3	-107.3	-107.5
TOTAL SOURCES AND USES	-9.9	-11.0	-11.0
Change in Fund Balance	-2.5	-1.7	0.6
Beginning Fund Balance	7.2	4.7	3.0
Ending Fund Balance	4.7	3.0	3.6
Revolving Cash	-0.1	-0.1	-0.1
Assignment for Supplemental Grant LCAP	-1.0	-1.0	-1.0
Fund 01 share of 3% reserve	-1.0	-1.0	-0.6
Ending Fund Balance - Undesignated	2.6	0.9	1.9

Budget Reduction Strategies

Evaluate and Remove Vacant Positions*

Truing up Program Costs: Evaluate Program Costs and make sure allocation matches true cost

Eliminate Expenses covered in other funding sources
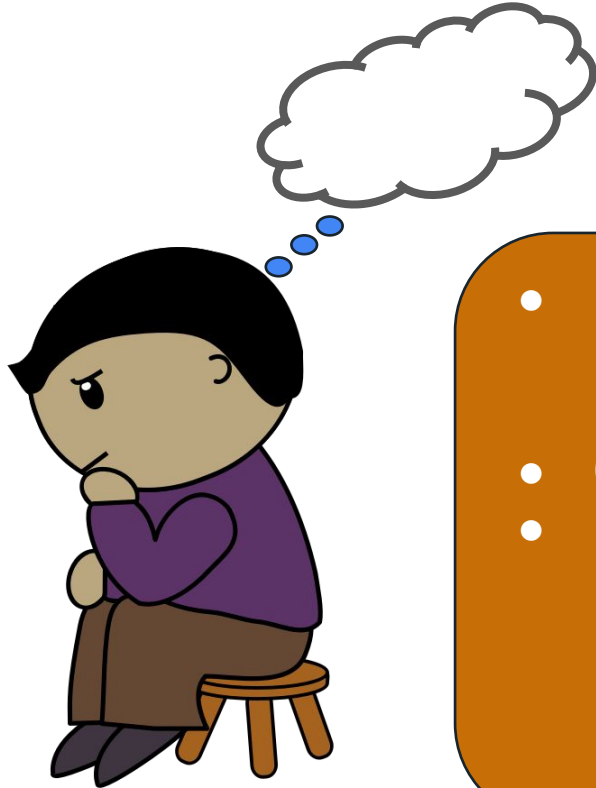
Evaluate Annual Unexpended Funds

Look for inefficiencies: Identify Examples (programs and positions) where we duplicate efforts

Transfer Expenses to other funding sources

Consolidate and Reduce (Positions and Programming)

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Evaluate and Remove Vacant Positions*

Vacancies Report

- **Removing Vacant Positions after analysis**
  - 21.58 FTE at an estimated savings of $1,773,049.54 (multiple funds)
  - Continuing to analyze 133.65 FTE that is vacant
- **Considering Potential Hiring Freeze(s)**
- **March 15th Notices prepared for positions**
  - considered temporary due to funding
    - includes PTA monies, Expiring Grants, One-Time Funding, and Monies with Plans pending Board Approval
  - being adjusted due to changing student enrollment

Check for Understanding

True or False?
BUSD is cutting a total of $14.6 Million
($6.0M in 2024-25 and $8.6 in 2025-2026)?

True or False?
Positions that receive the March 15th notice are final decisions for consolidation?
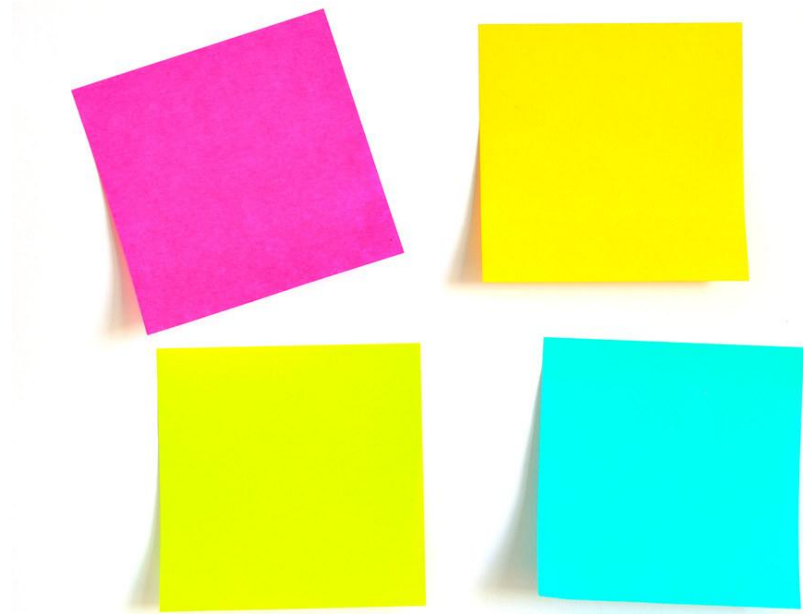
True or False?
All advisory committees advise on Unrestricted General Funds?

Budget Asks

[Budget Jamboard](#)

- Think about the budget asks that your committee has made over the past couple of years
- Think about the budget asks that your committee is thinking to make this budget season
- **Create a post it for each budget recommendation or ask**

Continuous Improvement

-

The Model for Improvement

- *How often does your committee engage in these questions?*

- *If you asked these questions of your committee now, how much alignment would there be? Would most or all members answer the same?*

What are we trying to improve?

What changes might we make (or actions might we take) and why?

What changes might we make (or actions might we take) and why?

improvement?
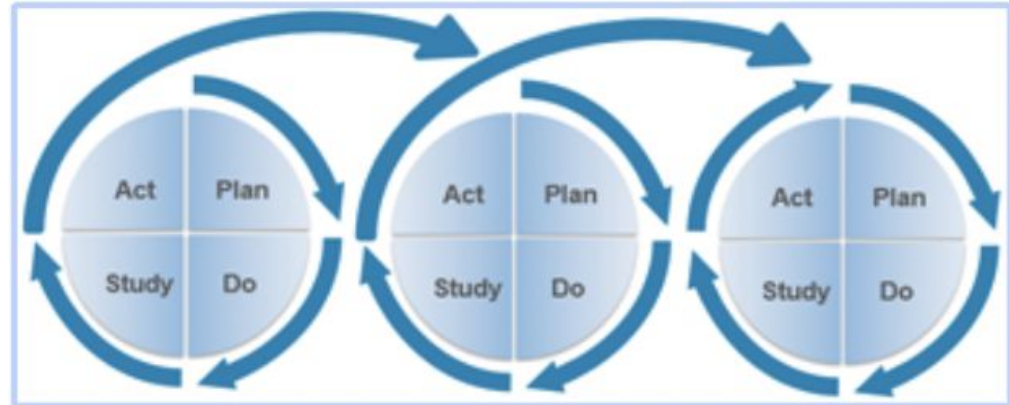
* *Modified from Associates in Process Improvement*

Our Continued Focus 2023-2024

# *Organizational Clarity*

"What we need is consistency of purpose, policy, and practice. Structure and strategy are not enough. The solution requires the individual and collective ability to build shared meaning, capacity, and commitment to action. When large numbers of _people have a deeply understood sense of what needs to be done—and see their part in achieving that purpose—coherence emerges and powerful things happen._"

- **Michael Fullan**

Maybe we should build a boat instead...
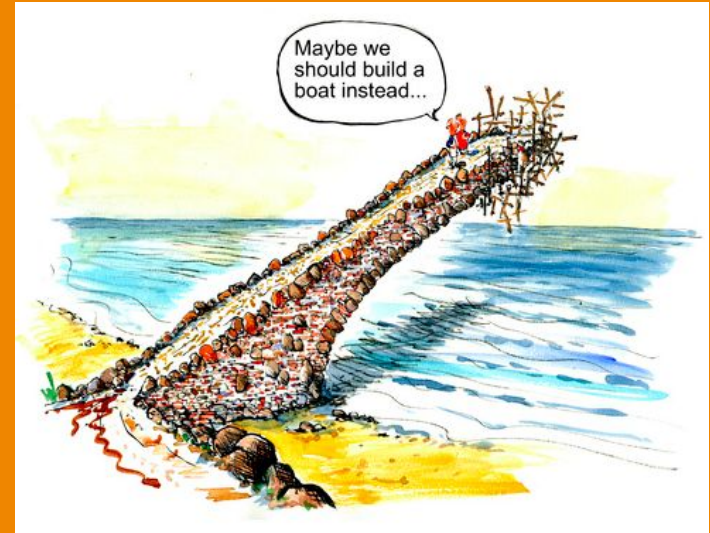
Core Values of Resource Allocation

Equity

We allocate resources to create the conditions to realize our district mission, address inequities and remove barriers that hinder that mission from being realized

Transparency

We believe it essential that the community understands the criteria and conditions that inform the allocation of resources

Excellence

We engage in continuous improvement - reflecting on resource allocation decisions, progress monitoring and using data to inform and evaluate implementation and impact

Engagement

We believe that context matters and that those closest to the work with the deepest understanding must have input in the decisions to leverage resources and meet student needs.
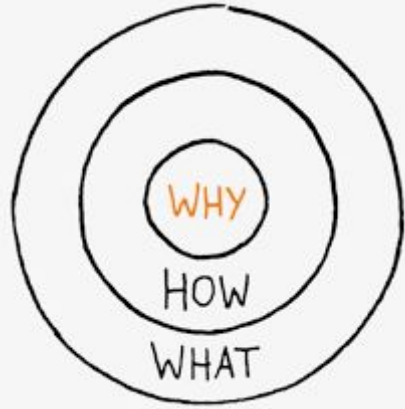
Sustainability

We allocate resources responsibly, planning not just on how to start programming but also considering staff, time, and resources required to sustain those initiatives.

Stability

What are we trying to improve?

What changes might we make (or actions might we take) and why?

"You can do anything but you can't do everything"

* Modified from Associates in Process Improvement

What's Next?

Joint Committee Meeting

May 16, 2024 6-7pm

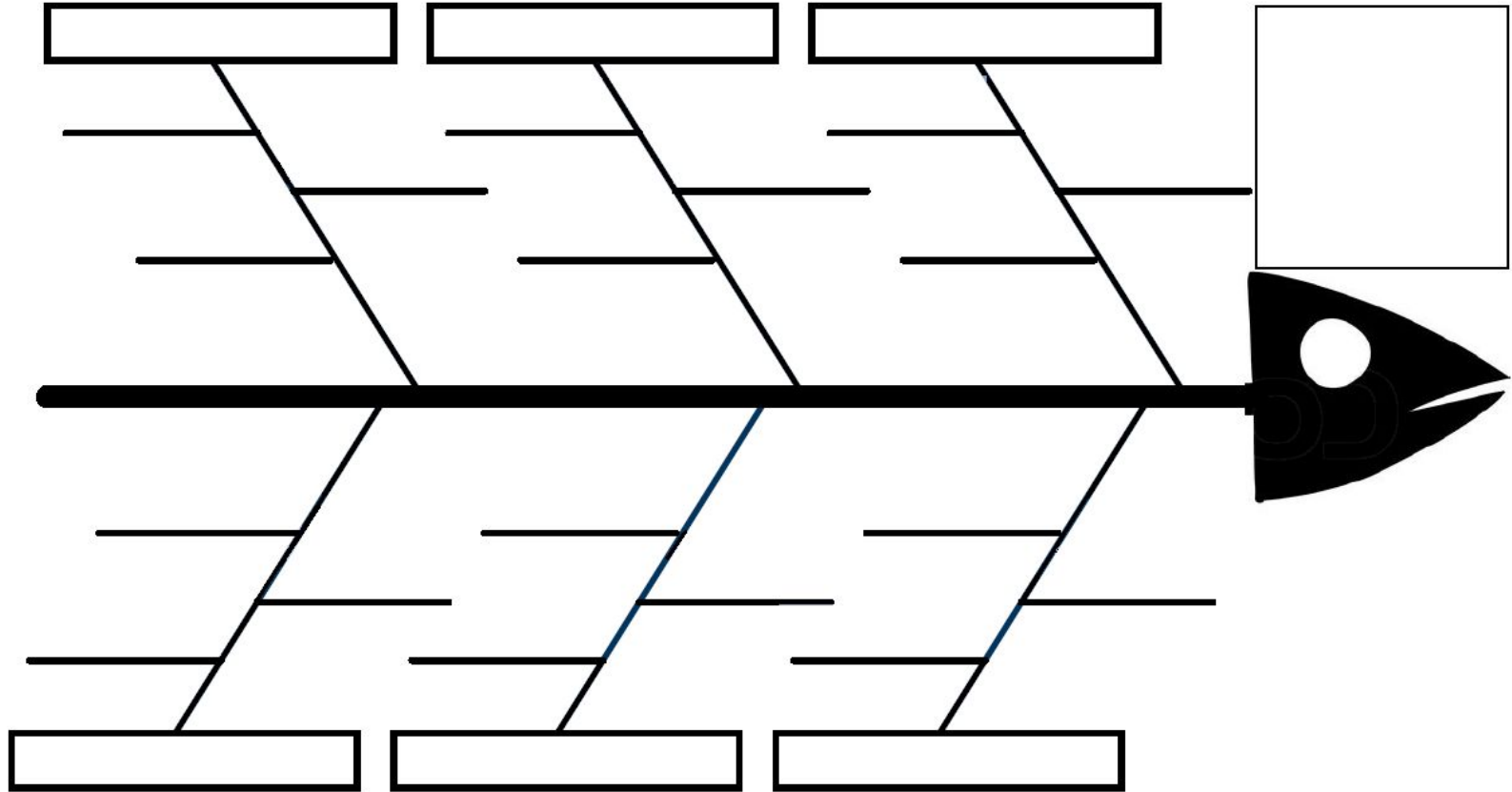**Joint Committee Session Feedback**

Up Next...
- Advisory committee representatives attend SBAC on 3/13, 3/27, 4/3, 4/24, 5/1, & 5/15
- Next Joint Committee Meeting on May 16

Appendix

Key Budget Terms
Cross Functional Breakout Responses from November 2023 meeting

Categorizing Causes: Fishbone Diagram

Term	Definition
Unaudited Actuals	How much the district actually spent in expenditures and earned in revenue for the year ended June 30, 2022
Estimated Actuals	What the District budgeted for expenditures and revenues for the year ended June 30 2022, as of June 29, 2022 when the 2022-23 budget was adopted. We update the Adopted budget three times a year
Fund Balance	Cumulative balance of expenditures and revenues.
Unrestricted General Funds (UGF)	Funds that are not legally restricted for a particular purpose - the district's operating revenue
Reserve	Amount required to be set aside for economic uncertainties
May Revise	The Governor issues budget updates three times during the year. In January he issues the initial budget. The budget is revised in May (May Revise), and the final or enacted budget is issued in June.
Variance Report	Variance Report compares the difference between the Estimated Actuals and the Unaudited Actuals

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LCFF Base	The Local Control Funding Formula (LCFF) is hallmark legislation that fundamentally changed how all local educational agencies (LEAs) in the state are funded, and provides funding based a per pupil grant allocation for each grade span.
LCFF Supplemental	Equal to 20 percent of the adjusted base grant multiplied by ADA and the unduplicated percentage of targeted disadvantaged pupils. Targeted pupils are those classified as English learners (EL), meet income requirements to receive a free or reduced-price meal (FRPM), foster youth, or any combination of these factors (unduplicated count).
Services and Operating Expenses	Expenditures for professional services, instructional and non-instructional services & consultants, sub-agreements for services, legal services, field trip costs, printing, advertising, catering, and computer software licenses & subscriptions.
Direct Costs	Transfer of costs for services between departments and programs include services provided such as printing, transportation for field trips, catering, maintenance & repair, and technology expenses.
Indirect Costs	Transfer of indirect costs between programs and funds. Indirect costs are district-wide general management costs. It consists of administrative activities necessary for the general operation of the district, as as accounting, budgeting, payroll preparation, personnel services, purchasing, centralized data processing.

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Average Daily Attendance (ADA)	Total ADA is defined as the total number of days of student attendance divided by the total number of days in the school year. Absent students are not counted in the daily count. A student attending every day would equal one ADA. ADA is not the same as enrollment, which is the number of students enrolled in district.
Unduplicated Pupil	Unduplicated of pupils are students who (1) are English learners, (2) meet income or categorical eligibility requirements for free or reduced-price meals under the National Schools Lunch Program, or (3) are foster youth.
Cost of Living Allowance (COLA)	An increase in funding for schools from the state or federal government due to inflation. The funded COLA for FY 2022-23 is 6.56%

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Group 1:

I'd like to have a global understanding of how the school system works to engage people in my committee to participate more (e.g. administration workings from top to bottom).
Questions that I have: What's already available? What change is needed with what's available? What resources are available?

There's so much information in my committee. I'd like support in bringing committee conversation points discussed with the group back to the SSC. Having a PDF of comments or summary of the meeting to have some talking points would be most helpful.

Group 2:

Improve transparency – Information that parents do not have access to. (reclassification process) → need to talk through the resources, not just provide the resources.

Communication → Schools to Families and visa versa.

Informed about the limits. What is within the locus of control of our committee.

Group 3:

Data and metrics pertaining to demographic groups and student performance
Understanding our student body relative to budgeting and allocations
Responsiveness and transparency - knowing what we can do and where there are constraints
Clarity around how budget is already allocated

Group 4:

How can we look at things through an equity lens, need evaluation method,
get clear about what we mean about excellence and engagement
many groups working to improve, how does that work converge,
operating principles to help us to understand if we are meeting our goals, how can we use this data to better inform our practice

Group 5:
- DATA - Easier access to data or streamlined process of requesting data from BREA (often committee needs are specific therefore generalized data is not as helpful). Also date as it relates to metrics of results   - TIME - ability to come prepared to meetings, so that it is less about presentations and more about meaningful discussions   - TRANSPARENCY - objectives of the groups as well as the purpose (contributing vs. just voting)
Group 6:

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Continuous Improvement
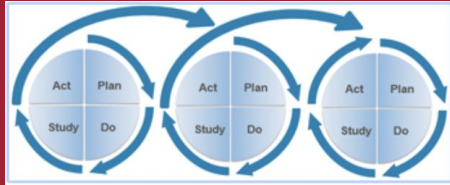
The Model for Improvement

What are we trying to improve?

What changes might we make (or actions might we take) and why?

How will we know if a change (or action) led to improvement?

* *Modified from Associates in Process Improvement*