

## **BERKELEY UNIFIED SCHOOL DISTRICT**

**TO:** BSEP Planning and Oversight Committee  
**FROM:** Natasha Beery, Director of BSEP and Community Relations;  
BSEP Planning and Oversight Committee  
**DATE:** January 15, 2013  
**SUBJECT:** Annual Report of Revenue and Expenditures in FY 2011-12 of the  
*Berkeley Public Schools Educational Excellence Act of 2006*  
(BSEP/Measure A)

In compliance with *The Berkeley Public Schools Educational Excellence Act of 2006* (BSEP/Measure A), the District makes available to the Planning and Oversight Committee an Annual Report of the revenues generated by the BSEP Measure, and the expenditures of the revenues for each Fiscal Year.

The Planning and Oversight Committee has reviewed the Annual Report for FY 2011-12, and hereby provides this report to the Board of Education on the District's compliance with the conditions of this Measure.

All BSEP revenue from *Measure A of 2006* is deposited, monitored and expended through the BUSD accounting system (QSS) in an account (Fund 4) which is accounted for separately from the District's General Fund (Fund 1). BSEP Fund 4 revenue is allocated to each of the purposes delineated in the BSEP Measure in separate and distinctly coded Resources in accordance with the percentages specified by the measure<sup>1</sup>.

The attached Annual Report displays the revenue and expenditures of each Resource of Fund 4 at the closing of Fiscal Year (FY) 2011-12, as well as a brief description of the status of projects funded through BSEP. Appendix A provides an overview of FY 2011-12 expenditure of carryover funds from the BSEP Measure B of 1994, Funds 5, 6, and 7.

### **DISTRICT GOAL**

V-B. Parcel Tax and Bond Revenues: Provide the best possible education for all students by effectively utilizing local parcel tax and bond revenues.

### **POLICY/CODE**

*Berkeley Public Schools Educational Excellence Act of 2006* (Measure A)  
*Berkeley Public Schools Educational Excellence Act of 1994* (Measure B)

### **FISCAL IMPACT**

In FY 2011/12, BSEP Measure A of 2006 provided 20% of the District's combined General Fund revenue, in the amount of \$23,904,119. In addition,

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<sup>1</sup> BSEP Measure A, Section 2.

carryover funds from BSEP Measure B of 1994 accounted for \$69,645 in expenditures.

**STAFF RECOMMENDATION**

Review and accept the annual report of 2011-12 BSEP Revenue and Expenditures from Measure A of 2006, and BSEP Measures B of 1994.

## INTRODUCTION TO THE BSEP ANNUAL REPORT

The BSEP Annual Report is organized to clearly display how the expenditures in FY 2011-12 relate to the purposes of BSEP Measure A of 2006.<sup>1</sup> Revenue is allocated to each of the purposes delineated in BSEP Measure A in separate and distinctly coded Resources in accordance with the percentages specified by the Measure<sup>2</sup>.

### Overview and Status Report

Each Resource is introduced with an Overview of revenue and expenditures, comparing the budget with actual expenditures, and explaining significant variances. The Overview is followed by a brief Status Report, providing additional detail on the projects funded by each BSEP Resource.

### Comparison Report

A Comparison Report for each Resource follows the Overview and Status Report. It displays previous expenditures in FY 2010-11, compared to the FY 2011-12 budget (revised at second interim, January 31, 2012), and the (unaudited) actuals as of June 30, 2012, and the variance between the budget and actuals. This comparison report also includes a Fund Balance analysis.

### Budget, First Interim, Second Interim, and Actual (Closing)

Revenue is projected in February for the following Fiscal Year (July 1-June 30), with budget allocations distributed to each of the Resources in accordance with the BSEP Measure. Since the District receives tax revenue at various points throughout the fiscal year, a first and second Interim Budget (October 31 and January 31) provide the opportunity to revise budget calculations. At the fiscal “closing” of the year on June 30, the actual net revenue is recognized, and the distribution to Resources is made.

### Unallocated Reserve

During the budgeting process, each Resource carries an unallocated reserve as a contingency to allow for variances in personnel expenditures (wage and fringe).

### Indirect Costs

The Indirect Cost rate in FY 2011-12 was 6.7% and is calculated by a formula determined by the State. The rate is applied to all expenses and transfers, and totaled **\$1,454,746**. These funds are transferred to the General Fund to support the District’s common functions such as Payroll, Purchasing, Human Resources and Plant Operations.

### Fund Balance

A Fund Balance for BSEP Fund 4 is maintained in a central resource (0000), to meet the 3% reserve required by the State. The Fund Balance totaled \$788,000 at the end of FY 2011-12, a reserve of 3.2%. There are also Fund Balances for each Resource, managed by the Program Managers and District administration.

### Transfers to General Fund

In addition to directly charged expenditures, Resource 0841 (Class Size Reduction) and Resource 0853 (Music) transferred a total of **\$12,449,625** to the General Fund in FY 2011-12. The transfers funded 130.49 FTE<sup>3</sup> to reduce class sizes, and 4.4 FTE for release time music teachers for the fourth and fifth grades.

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<sup>1</sup> BSEP Measure A, Section 5.C

<sup>2</sup> BSEP Measure A, Section 5.A

<sup>3</sup> FTE = Full Time Equivalent; the equivalent of one person working full time.

**BSEP TAX REVENUE ALLOCATION**  
**(BSEP Measure A)**

**Overview**

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**Budget Manager:**    **Monica Thyberg, Interim BSEP Manager**

Revenue from the *Berkeley Public Schools Educational Excellence Act of 2006* (BSEP) is based on the square footage of the residential and commercial property in the City of Berkeley. The tax collections each year vary according to changes in the square footage and the allowable Cost-of-Living Adjustment (COLA) made to the BSEP tax property tax rate.

**BSEP Revenue in 2011-12**

The BSEP tax rate in FY 2011-12 was 26.07 cents per square foot for Residential and 39.29 cents per square foot for Commercial property. There was a flat fee of \$57.18 for unimproved parcels. These rates reflect a 2.4% COLA increase from FY 2010-11 as approved by the Board.

In FY 2011-12, the gross BSEP tax revenue was \$23,940,030, an increase of \$322,330 over the budget projection. This was an actual increase of \$513,457 over revenues received in FY 2010-11. The increase in revenue from FY 2010-11 to FY 2011-12 was primarily due to the 2.4% COLA allowed under the Measure and approved by the Board. The revenue in excess of the budget in FY 2011-12 was the result of additional monies received from the City of Berkeley for its leased properties as well as revenue received under an agreement between the City of Berkeley and the University of California.

**Resource Allocation in 2011-12**

Revenue is allocated to each of the purposes delineated in the BSEP Measure in separate and distinctly coded Resources in accordance with the percentages specified by the measure<sup>1</sup>.

<u>Resource Code</u>	<u>Purpose</u>	<u>Percentage</u>
0854	Public Information & Translation	2.00% <i>of net</i>

After 2% of net revenue is allocated to Resource 0854, 100% of the available revenues<sup>2</sup> are allocated to the following purposes and deposited in restricted accounts.

0841	Class Size Reduction	66.00%
0852	School Site Discretionary	10.25%
0853	Music, Visual and Performing Arts	6.25%
0857	Parent Outreach Services	1.25%
0860	School Libraries	7.25%
0855	Professional Development	9.00% <i>shared</i>
0856	Program Evaluation	<i>by these three</i>
0862	Instructional Technology	<i>resources</i>

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<sup>1</sup> BSEP Measure A, Section 5.A

<sup>2</sup> Available Revenues” shall mean...after deduction of authorized collection charges by the county or city for collection of the tax and two percent (2%) of Special Tax revenues for public information, translation services for District families and support of the Planning and Oversight Committee.

**BSEP/Measure A of 2006  
Revenue Allocation Summary  
FY 2011/12**

				(1)	(2)	
	Res	%	Budget	Calculated Actuals	Unaudited Actuals as of 6/30/12	Variance
<b>Revenue</b>						
County Tax Collections			23,527,700	23,616,831		
City of Berkeley Tax Collections			100,000	365,371		
Rebates/Reduction in PY Receivable			(50,000)	(78,083)		
Interest			40,000	35,911		
<b>Total Projected Revenue</b>			<u>23,617,700</u>	<u>23,940,030</u>		
<b>Expenses</b>						
County Collection Fees			399,971	398,661		
City of Berkeley Fees			50,000	48,400		
Misc. Expense			0	515		
Audit and Legal Expense			6,000	5,088		
<b>Total Expenses</b>			<u>455,971</u>	<u>452,665</u>		
<b>Net Revenue</b>			23,161,729	23,487,365		
Reserve/Incremental Reserve			0	16,099		
<b>Net Revenue after Reserve</b>			<u>23,161,729</u>	<u>23,471,266</u>		
<b>Available for Allocation</b>			23,161,729	23,471,266		
Public Information/P&O	0854	2.00%	(463,235)	(469,425)		
<b>Net Available for Allocation</b>			<u>22,698,494</u>	<u>23,001,841</u>		
<b>Resource Allocation</b>						
			(a)		(b)	(b)-(a)
Class Size Reduction	0841	66.00%	14,981,006	15,181,215	15,181,547	200,541
Site Discretionary	0852	10.25%	2,326,596	2,357,689	2,357,740	31,144
Libraries	0860	7.25%	1,645,641	1,667,633	1,667,670	22,029
Music/VAPA	0853	6.25%	1,418,656	1,437,615	1,437,647	18,991
Parent Outreach	0857	1.25%	283,731	287,523	287,529	3,798
PD/Evaluation/Technology (9%)						
Prof. Development	0855	3.60%	817,146	828,066	828,084	10,938
Evaluation	0856	2.16%	490,287	496,840	496,851	6,564
Technology	0862	3.24%	735,431	745,260	745,276	9,845
<b>Net Resource Allocation</b>			<u>22,698,494</u>	<u>23,001,841</u>	<u>23,002,344</u>	<u>303,850</u>
Public Information/P&O	0854		463,235	469,425	469,436	6,201
<b>Total Allocation to All Resources</b>			<u>23,161,729</u>	<u>23,471,266</u>	<u>23,471,780</u>	<u>310,051</u>

(1) Calculated Actuals show how actual revenue would be distributed using the methodology used in the budget process.

(2) Unaudited Actuals reflect the actual revenue recorded in the books for each Resource.

3.3-C

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

**OVERVIEW**

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**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.<sup>1</sup>*

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**Budget Managers: William Huyett, Superintendent  
Monica Thyberg, Interim BSEP Manager**

The use of parentheses in displaying variance in this section requires an explanation. For transfers to the General Fund, a negative variance (shown in parentheses) represents an increase in the amount of the transfer; a positive variance represents a decrease in the amount of the transfer. For Expenditures, a negative variance (shown in parentheses) shows actual expenses were less than budgeted.

**REVENUE TRANSFERS TO THE GENERAL FUND**

<b>Teacher Compensation</b>	<b>130.49 FTE</b>	
<i>Budget: \$11,468,900</i>	<i>Actual: \$11,452,756</i>	<i>Variance: \$16,144</i>

<b>Substitute Compensation</b>		
<i>Budget: \$224,900</i>	<i>Actual: \$226,767</i>	<i>Variance: (\$1,867)</i>

<b>Direct Support<sup>2</sup></b>		
<i>Budget: \$384,000</i>	<i>Actual: \$387,384</i>	<i>Variance: (\$3,384)</i>

**EXPENDITURES**

<b>Certificated Salaries</b>	<b>20.7 FTE<sup>3</sup></b>	
<i>Budget: \$1,391,708</i>	<i>Actual: \$1,370,631</i>	<i>Variance: (\$21,077)</i>

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<sup>1</sup>BSEP Measure A, Section 3A.

<sup>2</sup> Operational and other costs associated with opening and maintaining additional classrooms

<sup>3</sup> Of the 20.7 FTE, 7.2 FTE was for Expanded Course Offerings and 13.5 FTE for Program Support

<b>Certificated Counselor Salaries</b>	<b>4.2 FTE</b>	
<i>Budget: \$310,598</i>	<i>Actual: \$322,220</i>	<i>Variance: \$11,622</i>
<b>Employee Benefits</b>		
<i>Budget: \$501,069</i>	<i>Actual: \$491,481</i>	<i>Variance: (\$9,588)</i>
<b>Indirect Costs:</b>		
<i>Budget: \$958,295</i>	<i>Actual: \$954,833</i>	<i>Variance: (\$3,462)</i>

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**STATUS REPORT**

The BSEP Class Size Reduction (CSR) funds allowed for the funding of **130.49 FTE** for classroom teaching. This represents over 30% of the teaching staff in the district. Class size reduction goals, as specified in the Measure, were met in FY 2011-12. Furthermore, because average class sizes in the K-3 grades were reduced to 20:1, the District qualified to receive state class size reduction funds, amounting to **\$2,661,593** in FY 2011-12.

Without the Class Size Reduction funds, average classroom sizes funded by the General Fund are significantly higher, from 34:1 in the elementary schools, to 36:1 in the Middle Schools and High Schools. The contribution of BSEP Class Size Reduction (CSR) Funds for classroom teachers is calculated each year on the “Teacher Template.” The Teacher Template reflects the actual enrollment and the agreed-upon class size ratios to be paid from General Fund monies and the ratios to be achieved with BSEP monies to reduce class sizes.

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. In the fall, when enrollment has somewhat stabilized, there can be increases to FTE if needed to maintain the Board-adopted class size ratios. (Conversely, the FTE allocation may be reduced if enrollment does not meet projections.) These changes may be reflected in the First or Second Interim Report of that school year or at the fiscal closing of the year.

At the fiscal closing in August, BSEP CSR monies are transferred to the General Fund to pay for class size reduction teachers, based on the actual cost of average teacher total compensation. This reimbursement to the General Fund by BSEP is known as the “Teacher Transfer.”

In FY 2011-12 there were sufficient funds to meet the class size reduction goals stipulated in the BSEP Measure, and also to provide a number of classroom teachers for “Expanded Course Offerings (ECO)” and “Program Support.” These teachers were charged directly to the BSEP Resource 0841. In FY 2011-12, these funds provided for:

- BHS Expanded Course Offerings: 5.60 FTE
- Middle School Expanded Course Offerings: 1.60 FTE
- Elementary Literacy Coaches 2.20 FTE
- 3/4/5 TWI Combination Classes (3 schools) 1.80 FTE
- Elementary ULSS Teachers 5.50 FTE
- Middle School Math Teachers 4.20 FTE

**BERKELEY UNIFIED SCHOOL DISTRICT**  
**BERKELEY SCHOOLS EXCELLENCE PROGRAM (BSEP)**  
**CLASS SIZE REDUCTION (Measure A, Resource 0841 )**  
**Revenue and Expenditures**  
**Comparison Report FY 2011/12**

**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.*

	(a)	(b)	(b) - (a)
	Audited	2nd Interim	Unaudited
	Actuals	Budget	Actuals
	2010/11	2011/12	2011/12
	as of 6/30/11	as of 1/31/12	as of 6/30/12
	<hr/>		
			2nd Interim
			Budget vs.
			Audited
			Actuals
			2011/12
	<hr/>		
<b>REVENUE</b>			
Revenue	14,836,804	14,981,006	15,181,547
BSEP Contribution to General Fund (1)	(11,629,970)	(11,468,900)	(11,452,756)
BSEP Direct Support (2)	(392,376)	(384,000)	(387,384)
BSEP Substitute Compensation (1)	(255,796)	(224,900)	(226,767)
<b>NET REVENUE</b>	<hr/> 2,558,662	<hr/> 2,903,206	<hr/> 3,114,640
<b>EXPENDITURES</b>			
Certificated Monthly Salaries (3)	1,226,042	1,391,708	1,370,631
Certificated Counselors Salaries (3)	300,492	310,598	322,220
Employee Benefits (3)	431,134	501,069	491,481
Unallocated Reserve	0	21,745	0
Indirect Costs	891,011	958,295	954,833
<b>TOTAL EXPENDITURES</b>	<hr/> 2,848,679	<hr/> 3,183,415	<hr/> 3,139,165
<b>NET INCREASE (DECREASE)</b>	(290,017)	(280,209)	(24,525)
<b>FUND BALANCE ANALYSIS</b>			
Beginning Fund Balance	1,630,292	1,340,275	1,340,275
Net Increase (Decrease) in Fund Balance	(290,017)	(280,209)	(24,525)
Ending Fund Balance	<hr/> 1,340,275	<hr/> 1,060,066	<hr/> 1,315,750

**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 FY 2010/11, the BSEP Contribution funded 136.72 FTE for classroom teachers. In FY 2011/12, it funded 130.49 FTE.
- (2) Operational and other costs associated with opening and maintaining additional classrooms.
- (3) Total FTE directly charged to Class Size Reduction includes 13.5 FTE for Program Support, 7.2 FTE for Expanded Course Offerings in the Middle Schools and Berkeley High School and 4.2 FTE for Middle School Counseling for a total of 24.9 FTE.



BERKELEY UNIFIED SCHOOL DISTRICT  
 CLASS SIZE REDUCTION FTE PLANNING DOCUMENT  
 FY 2011-12 Unaudited Actuals

GRADE LEVEL	TOTAL ENROLLMENT BY GRADE	GENERAL FUND * CLASS SIZE FTE	Meas. A CSR FTE	Necessary FTE	Meas. A CSR FTE
<b>ELEMENTARY SCHOOL</b>	<b>STUDENTS</b>	<b>34 :1</b>	<b>20 :1</b>		
Kindergarten	712	20.94	14.66	-0.60	
Grade 1	685	20.15	14.10		
- Release Time		0.81	0.56		
Grade 2	705	20.74	14.51		
- Release Time		0.83	0.58		
Grade 3	690	20.29	14.21		
- Release Time		0.81	0.57		
1-3 Adjustments				0.00	
		<b>34 :1</b>	<b>26 :1</b>		
Grade 4	651	19.15	5.89		
- Release Time **		3.83	1.18		
Grade 5	572	16.82	5.18		
- Release Time **		3.36	1.04		
4-5 Adjustments				2.95	
<b>K-5 TOTAL</b>		<b>127.73</b>	<b>72.48</b>	<b>2.35</b>	<b>74.83</b>
		<b>34 :1</b>	<b>18 :1</b>		
Grade K-5 Special Day Class		0.00	0.00	0.00	0.00
Release time Special Day Class		0.00	0.00	0.40	0.40
<b>MIDDLE SCHOOL</b>		<b>36 :1</b>	<b>28 :1</b>		
Grade 6	605	16.81	4.80		
- Release Time		3.36	0.96		
Grade 6 Necessary Adjustments				1.67	
		<b>36 :1</b>	<b>28 :1</b>		
Grade 7	674	22.47	6.42		
Grade 8	633	21.10	6.03		
Grade 7-8 Adjustments				0.19	
<b>6-8 TOTAL</b>		<b>63.74</b>	<b>18.21</b>	<b>1.86</b>	<b>20.07</b>
		<b>34 :1</b>	<b>18 :1</b>		
Grade 6-8 Special Day Class		0.00	0.00		0.00
Release time Special Day Class		0.00	0.00	0.40	0.40
<b>HIGH SCHOOL ***</b>		<b>36 :1</b>	<b>28 :1</b>		
Grade 9	722	24.08	6.88		
Grade 10	802	26.72	7.64		
Grade 11	823	27.44	7.84		
Grade 12	761	25.37	7.24		29.60
		<b>36 :1</b>	<b>18 :1</b>		
Grade 9-12 Special Day Class		0.00	0.00		0.00
B-Tech	150	5.00	5.00		5.00
Grade 9-12 Adjustments				0.19	0.19
<b>TOTAL 9-12</b>		<b>108.61</b>	<b>34.60</b>	<b>0.19</b>	<b>34.79</b>
<b>TOTALS</b>					
Elementary School	4,015	118.09	68.55	2.35	75.23
- Release Time		9.64	3.93	0.40	
Middle School	1,912	60.38	17.25	1.86	20.47
- Release Time		3.36	0.96	0.40	
High School	3,258	108.61	34.60	0.19	34.79
	<b>9,185</b>	<b>300.08</b>	<b>125.29</b>	<b>5.20</b>	<b>130.49</b>

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**BSEP/MEAS A PROJECTED EXPENSE FOR CSR**

FTE Ave Compensation	85,207.62		10,675,662.71	443,079.62	11,118,742.33
Sub Ave Compensation	1,680.00		210,487.00	8,736.00	219,223.00
Direct Support	2,870.00		359,582.30	14,900.00	374,482.30
Preliminary Measure A Transfer	89,757.62		11,245,732.01	466,715.62	11,712,447.63

\* State K-3 CSR Revenue \$2.7 million (projected)

\*\* Two fifths of General Fund release time is for music paid from the BSEP Measure A VAPA Budget

\*\*\* Based on Average Enrollment



**Books and Supplies** (13.2% of total expenditures)

*Budget: \$380,951                      Actual: \$328,258                      Variance: (\$52,693)*

**Contracted Services** (13.9% of total expenditures)

*Budget: \$348,994                      Actual: \$296,675                      Variance: (\$52,319)*

**Indirect Costs**

*Budget: \$186,554                      Actual: \$155,604                      Variance: (\$30,950)*

The variance in budget and expenditures was due to factors including: 1) salary and benefit savings from planned positions left vacant during part of the year, 2) changing in the funding for academic intervention programs initially funded by BSEP, but subsequently funded by federal dollars, 3) planned savings by an SGC, and 4) a more rigorous procedure at Berkeley High for requesting BSEP funds for instructional materials and equipment.

At the end of 2011-12, unexpended funds in the BSEP School Discretionary budgets ranged from a low of \$2,809 at an elementary school to a high of \$129,818 at Berkeley High School. All BSEP School Discretionary dollars left unspent at the end of FY 2011-12 have been carried over to this year's site budgets, for expenditure in FY 2012-13.

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**STATUS REPORT**

The School Site Discretionary funds provided a broad variety of programs during the school day and before and after school. The resource played a significant role in academic and social-emotional support in the schools, and provided enrichment and experiential learning opportunities. In many cases, BSEP funds provided the majority of instructional materials and equipment at the school sites. Although no two School Plans were alike, the thrust of the 2020 Vision to Close the Achievement Gap had a strong impact. For example, as in 2010-11, each elementary school paid for a portion of their Literacy Coach from these funds.

Summary of Programs Funded

- **Academic Support:**
  - **Pre-K:** Bookbag Literacy Program, literacy support;
  - **K-5:** Instructional Assistants, Literacy Coaches, English Language Development (ELD), and Bilingual Support Teachers, in-school and afterschool academic intervention & tutoring programs, Saturday Scholars Program, CalCorps BUILD tutors, staff development, reading program coordinator;
  - **6-8:** Read 180 Teacher and WriterCoach Connection programs, Academic Counselor;
  - **9-12:** BHS Student Academic Support Program (Student Learning Center, algebra tutors and study group leaders), R.I.S.E. Scholars program, English Learner Tutors, College/Career Advisors, Independent Study Program Study Skills Mentor & Tutors, B-Tech academic software.

- **Professional Development (Pre-K – 12):**
  - Pre-K “Creative Curriculum”, group book study, teacher substitutes for observations, curriculum planning & equity teams.
- **Mentoring, Counseling, Behavioral Support, and Safety:**
  - **Pre-K:** Counseling/Universal Learning Support Services (ULSS) from Bay Area Children First (BACF);
  - **K-5:** Parent Liaison, case management/family support from BACF, Bay Area Community Resources (BACR) and City of Berkeley Mental Health, ULSS teaching/coordination, Mosaic Project diversity awareness program, Noon Supervisors, Playworks training, Planned Parenthood puberty education program;
  - **6-8:** ULSS coordination, Mentors from Keepin’ It Real program (Nikao Youth Enrichment Services) and Stiles Hall, Youth Support Program VISTA Volunteer, Mental Health Counselors, AVID program, Noon Directors;
  - **9-12:** Berkeley High 9<sup>th</sup> & 10<sup>th</sup> Grade Intervention Coordinator, BHS and B-Tech On-Campus Suspension/Student Welfare and Attendance Specialists, Student Court, R.I.S.E. Scholars/Mentors, BHS Outsiders’ Club College Prep class with Berkeley City College.
- **Strengthening School-Family Connections:**
  - **K-5:** Rosa Parks Family Resource Center, Parent Institute for Quality Education training, Volunteer Coordinator;
  - **6-12:** Independent Study K-8 Program Coordinator, Berkeley High School Parent Resource Center, BHS Volunteer Coordinator, BHS Bilingual Home-School Liaison.
- **Arts and Movement:**
  - **Pre-K:** Dance classes;
  - **K-5:** Visual Arts, cafeteria art project, Dance, Music, and Drama classes, Physical Education, Arts Coordinator, Playworks, Berkeley YMCA P.E. & recess program, assemblies;
  - **6-8:** Art Teacher, afterschool performing arts and media classes, afterschool athletics, assemblies;
  - **9-12:** BHS Video program and Afro-Haitian Dance class.
- **Other Enriching Programs:**
  - **Pre-K:** Kindergarten visits, field trip transportation and admissions;
  - **K-12:** “Design It Green” afterschool class, garden programs and Americorps; garden volunteers, Computer Teacher, field trips; “Odyssey of the Mind” Olympiad.
- **Instructional Materials & Equipment (Pre-K-12):**
  - **Science:** consumables and lab equipment, garden supplies;
  - **Math:** web-based math program;
  - **Art:** visual art supplies and equipment, performing arts materials;
  - **Literacy:** classroom library books;
  - **Technology:** computers, software, document cameras and carts.

**BERKELEY UNIFIED SCHOOL DISTRICT  
 BERKELEY SCHOOLS EXCELLENCE PROGRAM (BSEP)  
 SCHOOL SITE DISCRETIONARY PROGRAM (Measure A, Resource 0852)  
 Revenue and Expenditures  
 Comparison Report FY 2011/12**

**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:** Neil Smith/Monica Thyberg

	<b>Audited Actuals 2010/11 as of 6/30/11</b>	<b>(a) 2nd Interim Budget 2011/12 as of 1/31/12</b>	<b>(b) Unaudited Actuals 2011/12 as of 6/30/12</b>	<b>(b) - (a) 2nd Interim Budget vs. Audited Actuals 2011/12</b>
<b>REVENUE</b>	2,304,201	2,326,596	2,357,740	31,144
<b>EXPENDITURES</b>				
Certificated Salaries	693,324	742,864	706,549	(36,315)
Classified Salaries	610,629	656,811	595,451	(61,360)
Employee Benefits	392,690	458,094	413,017	(45,077)
Books & Supplies	238,981	380,951	328,258	(52,693)
Unallocated Reserve	0	196,674	0	(196,674)
Contracted Services	229,389	348,994	296,675	(52,319)
Indirect Costs	135,684	186,554	155,604	(30,950)
<b>TOTAL EXPENDITURES</b>	2,300,697	2,970,942	2,495,554	(475,388)
<b>NET INCREASE (DECREASE)</b>	3,504	(644,346)	(137,814)	506,532
<b>FUND BALANCE ANALYSIS</b>				
Beginning Fund Balance	685,969	689,473	689,473	0
Net Increase (Decrease) in Fund Balance	3,504	(644,346)	(137,814)	506,532
Ending Fund Balance	689,473	45,127	551,659	506,532

**Notes**

Revenue is allocated to each school site based on the projected number of students for the year (CALPADS data). The projection is adjusted for Independent Study, B-Tech and Early Childhood Development and is based on an agreed-upon average enrollment. Revisions were made for sites with additional classrooms. Independent Study enrollment is deducted from Berkeley High's CBEDs enrollment. For FY 2010/11, the adjusted projected enrollment was 9,538 students. In FY 2011/12, it was 9,814.





arts integration techniques. In 2011-12 at five schools the focus was visual arts; three schools built dance integration skills. Most schools repeat the project from year to year.

In the Collaborative Partnerships category, \$10,000 was contributed by this Resource toward the Berkeley Symphony Orchestra program in the K-5 Schools.

Middle School Arts supported the teachers for the after school jazz band at Willard MS, the after school dance program at King and the after school jazz program at Longfellow. \$30,000 was budgeted and \$32,563 was spent. Because these classes are offered after school as a seventh period, there is no impact on the instructional minutes during the school day.

Making Learning Visible included funding for *Arts on the Run* buses and entry fees for middle school ensembles to play at regional festivals. Funds in this category support hourly time for teachers and custodial support for the annual Performing Arts Showcase held March 18, 2012. \$6100 was budgeted and \$4,265 was spent on this activity.

Acknowledging that the middle schools need strong arts programs to prepare students for the variety of arts offerings at Berkeley High School, the VAPA subcommittee feels strongly that students will benefit from additional performing arts courses in the sixth through eighth grades. To this end, After School Dance, Drama and Music have been supported with VAPA funds.

Two effective programs that offer music support to BUSD students are The Music Connection (TMC) and summer music camps offered through the City of Berkeley Parks and Recreation Department. Both programs are at no cost to the district. TMC students from UC Berkeley offer free small group lessons and ensemble playing after school classes at nearly every elementary and middle school. In addition, TMC volunteers assist in a large number of music classes during the school day, working with thriving and striving students who need extra attention.

In the summer of 2012, four music day camps (band, jazz, strings and Orff) were held at Willard Middle School, open to students in grades two through nine. BUSD music teachers provided instruction.

Collaborating with Berkeley High School As there are at present no vocal music classes for middle school choral students to move up to, there are continuing efforts to reinstate vocal music at the high school. In the 2011-12 school year a chorus club was formed by students who joined the orchestra in concert in June 2012.

Knowing that strong high schools have strong arts departments, VAPA staff collaborated with BHS staff to create two levels of band and two levels of orchestra at Berkeley High School for school year 2012-13, thus creating an appropriate articulated program to meet the students' stages of musical experience.



**BERKELEY UNIFIED SCHOOL DISTRICT**  
**BERKELEY SCHOOLS EXCELLENCE PROGRAM (BSEP)**  
**MUSIC , VISUAL AND PERFORMING ARTS (Measure A, Resource 0853)**  
**Revenue and Expenditures**  
**Comparison Report FY 2011/12**

**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:** Neil Smith/Suzanne McCulloch

	<b>Audited</b>	<b>(a)</b>	<b>(b)</b>	<b>(b) - (a)</b>
	<b>Actuals</b>	<b>2nd Interim</b>	<b>Unaudited</b>	<b>2nd Interim</b>
	<b>2010/11</b>	<b>Budget</b>	<b>Actuals</b>	<b>Budget vs.</b>
	<b>as of</b>	<b>as of</b>	<b>as of</b>	<b>Audited</b>
	<b>6/30/11</b>	<b>1/31/12</b>	<b>6/30/12</b>	<b>Actuals</b>
	<b>2011/12</b>	<b>2011/12</b>	<b>2011/12</b>	<b>2011/12</b>
<b>REVENUE</b>				
Revenue	1,405,000	1,418,656	1,437,765	19,109
Transfers to General Fund (Release Time) (1)	(341,305)	(342,783)	(382,718)	(39,935)
<b>NET REVENUE</b>	<b>1,063,695</b>	<b>1,075,873</b>	<b>1,055,047</b>	<b>(20,826)</b>
<b>EXPENDITURES</b>				
Certificated Salaries	560,327	622,901	619,039	(3,862)
Classified Salaries	52,966	56,125	52,589	(3,536)
Employee Benefits	169,811	207,811	194,944	(12,867)
Instructional Materials/Instruments	111,695	64,817	57,620	(7,197)
Equipment	44,462	28,183	24,768	(3,415)
Unallocated Reserve	0	19,417	0	(19,417)
Conference/Mileage/Instructional Contracts	104,391	111,528	67,787	(43,741)
Capital Outlay	17,603	1,074	0	(1,074)
Indirect Costs	86,837	97,561	93,764	(3,797)
<b>TOTAL EXPENDITURES</b>	<b>1,148,092</b>	<b>1,209,417</b>	<b>1,110,511</b>	<b>(98,906)</b>
<b>NET INCREASE (DECREASE)</b>	<b>(84,397)</b>	<b>(133,544)</b>	<b>(55,464)</b>	<b>78,080</b>
<b>FUND BALANCE ANALYSIS</b>				
Beginning Fund Balance	515,261	430,864	430,864	0
Net Increase (Decrease) in Account Balance	(84,397)	(133,544)	(55,464)	78,080
Ending Account Balance	430,864	297,320	375,400	78,080

**Notes**

(1) During FY 2010/11, this resource funded 6.84 FTE for Music and Visual and Performing Arts Teachers and and funded 3.84 FTE for release time music teachers through a transfer to the General Fund. In FY 2011/12, the numbers were 7.08 FTE and 4.40 FTE respectively.

**PUBLIC INFORMATION, TRANSLATION SERVICES, and  
SUPPORT OF THE PLANNING AND OVERSIGHT COMMITTEE  
(BSEP Measure A, Resource 0854)**

**OVERVIEW**

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**Purpose**

*Public information, translation services for District families and support of the Planning and Oversight Committee<sup>1</sup>*

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**Budget Managers:** William Huyett, Superintendent  
Monica Thyberg, Interim BSEP Manager

**Classified Salaries**

<i>Budget: \$348,222</i>	<i>Actual: \$338,235</i>	<i>Variance: (\$9,987)</i>
• BSEP Program Manager	1.0 FTE	
• BSEP Administrative Coordinator	1.0 FTE	
• Public Information Officer	1.0 FTE	
• Specialist, Translation and Interpretation:	0.5 FTE <sup>2</sup>	

In addition to salaried positions, hourly staff provided P&O meeting support (set-up, minutes) and some additional translation services. The transition of the Program Manager position in February 2012 resulted in some salary and fringe benefit savings.

**Contracted Services**

<i>Budget: \$103,160</i>	<i>Actual: \$62,493</i>	<i>Variance: (\$40,667)</i>
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At adoption, the budget for contracted services was established to produce two newsletters, update the District website and provide translation services. During the course of the year, a staff position was created to provide translation services rather than contracting with an outside agency, reducing the need for contracted services. The District contracted with Language Line, an outside agency, to launch a pilot program to provide translation services. Increased use is expected as users become more familiar with the service.

There were also reduced expenditures in the contracted services line item based on the production of a second Biannual Report taking place after the close of the 2011-12 fiscal year.

**Equipment and Supplies**

<i>Budget: \$9,893</i>	<i>Actual: \$11,120</i>	<i>Variance: \$1,227</i>
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The variance was due to unexpected computer needs for the staff.

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<sup>1</sup> BSEP Measure Section 6A

<sup>2</sup> Another 0.5 FTE is funded by the General Fund for this full-time position

## **STATUS REPORT**

There were changes in staffing during the year. A .05 FTE Specialist for Translation and Interpretation was hired to meet growing demand for translation services. Hourly staff was hired to provide continuity during staff leave, and there was a transition in the BSEP Program Manager position. Expenditures remained within the original budget.

The BSEP Manager and Administrative Coordinator provided support for the Planning and Oversight Committee, including:

- Supported the September School Governance Council (SGC) elections and the appointment of P&O Representatives from each school site in October;
- Prepared the annual SGC Election, Diversity, and Activity Report for the Board in November;
- Conducted the SGC and Parent Leader Orientation on October 27, 2011, and an Orientation for new P&O Representatives on November 29, 2011;
- Planned and facilitated 14 P&O Committee meetings and three P&O Subcommittee meetings, providing documents, coordinating guest speakers, and preparing presentations.

In addition to support of the P&O Committee, the BSEP Manager and Administrative Coordinator were responsible for many of the operational and technical tasks necessary to implement the BSEP Measure in the District's financial systems, working alongside the Senior Budget Analyst to ensure careful oversight of funds.

The Administrative Coordinator and Senior Budget Analyst worked with each school Principal and School Governance Council/BSEP Manager to analyze and develop each school's BSEP School Discretionary Fund budget and plan.

### Public Information Officer

- Produced the Board Updates, posted on the BUSD website following every Board meeting, including a summary of agenda items, Board decisions, and Vimeo clips from key presentations and discussions;
- Compiled and distributed the *Weekly Bulletin* to principals and other administrators and staff every Monday, which served as a key information conduit from the central administration to the school sites;
- Responded to requests from news media and community members;
- Covered district issues and student events, including documenting and photographing student activities, district meetings, and community forums.

### Specialist, Translation and Interpretation

The BUSD English Learner (EL) population exceeds 15% for the Spanish language, triggering the requirement to translate key documents into Spanish. In addition, the enrollment at five Berkeley schools (Cragmont, Rosa Parks, LeConte, Thousand Oaks, and Longfellow) exceeds 15% Spanish speaking, which means school documents are to be translated at those sites.

With a growing demand for translation and interpretation services, a new Bilingual Spanish-English Specialist for Translation and Interpretation position was created. The position was filled

in January 2012 and funded 50% by this BSEP resource, with the other 50% from the General Fund.

In order to ensure the inclusion of families who require communication in a language other than English, contracted interpretation services were established with the Language Line, a telephone-based service providing simultaneous translation in many languages.

#### Improving Communications

In adopting the BUSD Mission Statement in August 2010 and following the findings of the Spring 2011 Communications Study, the Board of Education made a commitment to provide clearer and more strategic communication with families and the wider Berkeley community. Expenses in the contracted services areas of the budget were used to support these communication efforts as staff worked in conjunction with outside contractors who provided content, consultation, translation, printing, and mailing services. Projects included:

##### *A+ eNews*

The twice-monthly *A+ eNews*, produced in both English and Spanish, has been the primary communication tool for keeping our families and community apprised of the events, programs, services, and new initiatives in Berkeley public schools through direct subscriber email delivery and website access. In addition, limited paper copies are provided at school sites. The *A+ eNews* is sent electronically every two weeks to 2,238 staff and 5,195 parents and community members. It is translated into Spanish and sent to a growing list of Spanish-language subscribers (currently at 325 households).

##### BUSD Website

A refreshed website was launched in September 2011 and includes easier navigation tools, a homepage blog with an RSS feed function, and webpage translations in multiple languages powered by Google Translate.

##### Berkeley Schools Biannual Report

This BSEP Resource paid for the January 2012 production of a re-envisioned Biannual communication to all 46,000 residential addresses in Berkeley. Berkeley taxpayer dollars fund 20% of the BUSD General Fund budget through the BSEP tax; the four page document focused on the District budget, including BSEP funded programs, and an update on new and continuing construction projects. This was the first year that a complete Spanish version of the Biannual Report publication was produced. This publication also serves as a resource for the human resources, admissions, and other District departments involved in outreach to prospective faculty, staff, and families.

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**BERKELEY UNIFIED SCHOOL DISTRICT  
 BERKELEY SCHOOLS EXCELLENCE PROGRAM (BSEP)  
 PUBLIC INFORMATION , TRANSLATION,  
 P&O COMMITTEE SUPPORT (Measure A, Resource 0854 )  
 Revenue and Expenditures  
 Comparison Report FY2011/12**

**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:** Monica Thyberg

	(a) Audited Actuals 2010/11 as of 6/30/11	(a) 2nd Interim Budget 2011/12 as of 1/31/12	(b) Unaudited Actuals 2011/12 as of 6/30/12	(b) - (a) 2nd Interim Budget vs. Audited Actuals 2011/12
<b>REVENUE</b>	458,776	463,235	469,441	6,206
<b>EXPENDITURES</b>				
Classified Salaries	247,934	254,364	247,030	(7,334)
Employee Benefits	96,558	93,858	91,205	(2,653)
Supplies/Equipment	5,865	11,508	11,120	(388)
Unallocated Reserve	0	2,310	0	(2,310)
Contracted Services	87,661	103,160	62,493	(40,667)
<b>TOTAL EXPENDITURES</b>	438,018	465,200	411,848	(53,352)
<b>NET INCREASE (DECREASE)</b>	20,758	(1,965)	57,593	59,558
<b>FUND BALANCE ANALYSIS</b>				
Beginning Fund Balance	207,277	228,035	228,035	0
Net Increase (Decrease) in Fund Balance	20,758	(1,965)	57,593	59,558
Ending Fund Balance	228,035	226,070	285,628	59,558



**Indirect Costs**

*Budget: \$68,344*

*Actual: \$55,033*

*Variance: (\$13,311)*

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**STATUS REPORT**

In 2011-12, Professional Development priorities included literacy, algebra readiness and success, Response to Intervention/ULSS, cultural responsiveness, effective use of assessment data, and support for new teachers. Most of these initiatives were carried out by Teachers on Special Assignment (TSAs), as described below.

**Elementary Literacy Coaches**

Each elementary school had the equivalent of a full-time literacy coach to address the specific literacy needs of its students by providing intervention for students and coaching for teachers. Funds came from this Resource for .25 FTE, another .20 FTE came Resource 0841, and .55 FTE was funded by BSEP School Site Discretionary Funds (Resource 0852). In FY 2011-12 the coaches led the implementation of a new reading program for the district, Teacher College Reading and Writing Project (TCRWP).

**Literacy Lead Coach**

This part-time position facilitated the work of the elementary Literacy Coaches, providing training in coaching as well as effective strategies for teaching literacy skills.

**TSA for Middle School Literacy**

This part-time position worked with middle school teachers to support the implementation of the English Language Arts curriculum and the administration of common quarterly assessments.

**Math Coach (K-5)**

This full time coach, funded .85 FTE by this Resource, modeled classroom lessons for teachers, provided feedback to teachers based on classroom observations, facilitated workshops to deepen teachers' content knowledge, developed formative assessments, provided feedback to teachers on their students' performance on district assessments, and reinforced the standards that are key to student success in middle and high school math.

**Teacher Leaders at BHS**

In 2011-12 BSEP continued to support five teacher instructional leaders at BHS at .20 FTE each, to facilitate professional development study groups, such as lesson study, literature study or action research, to improve instructional practices and improve student performance.

**TSA for Improving Instruction Using Data**

This position provided support for using DataWise, a software system for student data management that includes information on student achievement, attendance, course enrollment, student demographics, and program participation.

**TSA for RtI / Behavior Specialist**

This position provided training on fully implementing Academic and Positive Behavior Intervention support systems at K–12 sites.

### **TSA - Instructional Technology Coach**

This coach provided guidance and support in using a variety of educational tools, including: Holt Mathematics online tutorials for middle school students; CompassLearning, an online intervention program; Scholastic Reading Inventory, an electronic reading diagnostic tool; Read 180, a reading intervention program that includes a computer based component; and DataWise, the data management system.

### **Professional Development Coordinator**

The Full-time Coordinator of Professional Development was funded from this resource to 0.20 FTE to oversee the professional development efforts outlined here.

### **Supervisor of Culturally & Linguistically Responsive Systems**

In FY 2011-12, this full time position, funded .55 through BSEP Professional Development funds, assisted the Superintendent in leading the work of the district's Equity Team, provided a series of workshops to staff, worked with faculties at some schools, collaborated with the Parent Resource Office to solicit feedback from families, and facilitated workshops for parents.

### **Additional Initiatives:**

In addition to the funded positions listed above, allocations were made to Teacher Initiated Professional Development, Middle School Writing Scoring, and Stipends for 31 K-8 Curriculum Teacher Leaders. These expenditures fell in the certificated expense category.

#### **Teacher-Initiated Professional Development**

BSEP PD funds allowed teachers the time and the structure to focus on areas of professional growth that they identified as meaningful to them, by paying for substitutes and teachers' time after school. Of the \$50,000 allocated to this purpose, \$20,779 was expended; more teachers at more sites availed themselves of this opportunity than in previous years.

#### **Middle School Writing Scoring**

Substitutes allow middle school language arts teachers to meet with grade level colleagues from the other schools to discuss and score student writing. Of the \$15,000 allocated to this purpose, \$8503 was expended.

#### **Stipends for 31 K-8 Curriculum Teacher Leaders**

Nineteen stipends were used for fifteen K-8 math lead teachers and four middle school English language arts lead teachers. K-5 literacy curriculum lead teachers were not yet identified.

### **IB and AP Training for BHS Teachers (Contracted Service)**

Specialized training is required for certain programs at the high school level. Berkeley High School teachers enrolled in week-long subject-specific workshops to prepare for teaching Advanced Placement and International Baccalaureate courses. Of the \$15,000 allocated, \$9,461 was expended. These workshops took place in summer, and some charges were carried into the next year.



**BERKELEY UNIFIED SCHOOL DISTRICT  
 BERKELEY SCHOOLS EXCELLENCE PROGRAM (BSEP)  
 PROFESSIONAL DEVELOPMENT  
 Revenue and Expenditures (Measure A, Resource 0855)  
 Comparison Report FY 2011/12**

**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: Neil Smith**

	(a)	(b)	(b) - (a)	
	Audited Actuals 2010/11 as of 6/30/11	2nd Interim Budget 2011/12 as of 1/31/12	Unaudited Actuals 2011/12 as of 6/30/12	2nd Interim Budget vs. Audited Actuals 2011/12
<b>REVENUE</b>	810,038	817,146	828,084	10,938
<b>EXPENDITURES</b>				
Certificated Salaries	542,237	658,541	588,805	(69,736)
Classified Salaries	26,517	30,333	29,165	(1,168)
Employee Benefits	138,699	196,023	175,080	(20,943)
Services & Other Operating Expenses	85,627	35,288	28,345	(6,943)
Indirect Costs	48,089	68,344	55,033	(13,311)
<b>TOTAL EXPENDITURES</b>	841,169	988,529	876,428	(112,101)
<b>NET INCREASE (DECREASE)</b>	(31,131)	(171,383)	(48,344)	123,039
<b>FUND BALANCE ANALYSIS</b>				
Beginning Fund Balance	456,086	424,955	424,955	0
Net Increase (Decrease) in Fund Balance	(31,131)	(171,383)	(48,344)	123,039
Ending Fund Balance	424,955	253,572	376,611	123,039

**Notes**

A \$50,000 budget has been established for Teacher Initiated Professional Development. It is included in the salary and benefit expense.



in FY 2012-13. The projected budget for Data Services was \$65,000; actual expenditures were \$52,852.

**Indirect Costs**

*Budget: \$35,334*

*Actual: \$30,243*

*Variance: (\$5,091)*

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**STATUS REPORT**

Following is a summary report of the activities accomplished with this BSEP Resource during FY 2011-12. Additional activities funded through other sources are not detailed in this report.

<u>Professional Development / Training Delivered by BEA Staff</u> <sup>4</sup>	<u>Number of Trainees</u>
• 10 DataWise Assessment System Varied Trainings	~30 per training
• 2 Intel Assess – Assessment Item Bank Trainings	~15 per training
• 5 Survey Monkey Trainings	~30-45 total
• 10 BHS data and administrative trainings	~75 total
• 10 Principal trainings (Using Data to Evaluate Programs)	~30 per training
• 1 Illuminate Assessment System Introductory training	~30 total
• Monthly Site Based Professional Development month	Every School, 1-2 times per month

District Assessment Support: Provided production support for all district assessments, which includes test duplication and distribution, design of assessments using Intel-Assess, score entry into DataWise, and score reporting (see list for subjects and frequencies). SPSS, PowerPoint and Excel used by the Director and Data Technician to Produce the Reports. Assessments were in English Language Arts (ELA) and Math for Grades 1-9 and 3x a year for Elementary and Middle School; twice a year for High School. Writing for MS was 4x year. This year a Kindergarten Universal Screener was conducted and Kindergarten staff also assessed students in ELA.

School Principal Support: All 16 principals received one-on-one support at their school sites on a regular basis (most monthly). Activities included support for Evaluating Programs series, providing supplementary data analysis, assisting principals to plan or prepare data presentations to staff or School Governance Council (SGC), and supporting principals in using DataWise, Survey Monkey or PowerSchool.

Reports: Provided reports that the School Board, District Administrators, and Schools can use to inform their practice including:

- 5 School Board Data Presentations
- 16 School Information Sheets (in English and Spanish)
- 16 Data Presentations for SGC or SSC and School Staff (all schools)
- Class Profile reports for every teacher grades 1-5, all math and English teachers grades 6-8, all 9<sup>th</sup> grade math, English, history, and science teachers,

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<sup>4</sup> (Contracted software / systems paid for by BSEP funds such as DataWise, Intel-Assess, SPSS and SurveyMonkey are listed by name.) Illuminate was introduced in the Spring to replace Datawise

- 20 District Assessment Summary reports

BHS and B-Tech WASC and Small Learning Community (SLC) Grant Support: Trained B-TECH site Teachers on Special Assignment (TSA) on DataWise and provided data presentation summaries for use with WASC accreditation visit. Supported BHS site TSA on interpreting and analyzing BHS data from BUSD School Board presentations.

2020 Vision Support and Partnership: Debbi D'Angelo participated with Superintendent Huyett in the implementation of Phase III of the 2020 which included a series of seven day-long 2020 meetings with City and Alliance staff. In addition, over 1000 hours of meetings and data-analysis were conducted with 2020 partners. Continued a partnership with McRel Corporation to research 9<sup>th</sup> Grade math.

Assessment Development:

- Organized and facilitated meetings with BHS ELA and math teachers to develop the common midterm and final for the Algebra, Geometry, and IMP math courses.
- Organized and facilitated meetings with the lead Pre-K and Kindergarten teachers to re-design the Kindergarten Universal Screening Tool for implementation in Fall, 2012.

Elementary Report Cards: Updated K-2 Elementary Report Cards to align to revised Math pacing guides including the update of teacher and family guides (in English and Spanish) for use with the Report Cards

BFT Survey: Implementation and analysis support of BFT survey to all members. The survey used the BEA Survey Monkey tool.

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**BERKELEY UNIFIED SCHOOL DISTRICT  
 BERKELEY SCHOOLS EXCELLENCE PROGRAM (BSEP)  
 EVALUATION (Measure A, Resource 0856 )  
 Revenue and Expenditures  
 Comparison Report FY2011/12**

**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:** Neil Smith/Debbi D'Angelo

	(a) Audited Actuals 2010/11 as of 6/30/11	(b) 2nd Interim Budget 2011/12 as of 1/31/12	(b) Unaudited Actuals 2011/12 as of 6/30/12	(b) - (a) 2nd Interim Budget vs. Audited Actuals 2011/12
<b>REVENUE</b>	485,568	490,287	496,851	6,564
<b>EXPENDITURES</b>				
Certificated Salaries	230,361	230,737	211,094	(19,643)
Classified Monthly Support Salaries	89,003	87,672	87,672	0
Employee Benefits	89,349	96,676	90,865	(5,811)
Books & Supplies	1,540	4,200	0	(4,200)
Unallocated Reserve	0	35,583	0	(35,583)
Services & Other Operating Expenses	56,182	72,500	61,759	(10,741)
Indirect Costs	29,245	35,334	30,243	(5,091)
<b>TOTAL EXPENDITURES</b>	495,680	562,702	481,633	(81,069)
<b>NET INCREASE (DECREASE)</b>	(10,112)	(72,415)	15,218	87,633
<b>FUND BALANCE ANALYSIS</b>				
Beginning Fund Balance	82,527	72,415	72,415	0
Net Increase (Decrease) in Fund Balance	(10,112)	(72,415)	15,218	87,633
Ending Fund Balance	72,415	0	87,633	87,633



**BERKELEY UNIFIED SCHOOL DISTRICT  
 BERKELEY SCHOOLS EXCELLENCE PROGRAM (BSEP)  
 PARENT OUTREACH (Measure A, Resource 0857)  
 Revenue and Expenditures  
 Comparison Report FY 2011/12**

**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:** Neil Smith

	(a) Audited Actuals 2010/11 as of 6/30/11	(b) 2nd Interim Budget 2011/12 as of 1/31/12	(b) Unaudited Actuals 2011/12 as of 6/30/12	(b) - (a) 2nd Interim Budget vs. Audited Actuals 2011/12
<b>REVENUE</b>	281,000	283,731	287,529	3,798
<b>EXPENDITURES</b>				
Staff	165,546	172,811	83,527	(89,284)
Employee Benefits	61,605	65,580	30,993	(34,587)
Books & Supplies	15,267	6,722	3,472	(3,250)
Unallocated Reserve	0	6,523	0	(6,523)
Services & Other Operating Expenses	34,579	30,932	24,949	(5,983)
Indirect Costs	17,366	18,932	9,578	(9,354)
<b>TOTAL EXPENDITURES</b>	294,363	301,500	152,519	(148,981)
<b>NET INCREASE (DECREASE)</b>	(13,363)	(17,769)	135,010	152,779
<b>FUND BALANCE ANALYSIS</b>				
Beginning Fund Balance	107,003	93,640	93,640	0
Net Increase (Decrease) in Fund Balance	(13,363)	(17,769)	135,010	152,779
Ending Fund Balance	93,640	75,871	228,650	152,779





unpacking and repacking for the move. The remainder of the variance is due to orders placed but not received before the end of the fiscal year.

### **Services and Other Operating Expenses**

*Budget: \$68,153*

*Actual: \$67,820*

*Variance: (\$333)*

These expenses include the software and licensing agreement for the library and textbook automation system, as well as district-wide subscriptions to World Book Online and TeachingBooks. Professional development expenses are also included in this line item.

### **Indirect Costs**

*Budget: \$109,806*

*Actual: \$105,119*

*Variance: (\$4,687)*

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## **STATUS REPORT**

BSEP funds provide the backbone for library staffing and resources throughout the Berkeley school system. Addressing every student's academic and independent reading needs with a wide range of books, online resources and integrated programming is the core of the mission. The library lens of the 2020 Vision strengthens the commitment to developing skilled thinkers and learners throughout the entire Berkeley school community.

Highlights of the past year include:

### Strategies to Promote Student Success

The BEARS Summer School Library program continued in the summer of 2012, with a Library Media Technician at both BEARS/EDC summer school sites (this year Malcolm X and Rosa Parks) for twelve hours per week at each site, a total of 24 hours per week for five weeks. This program supports the focus on literacy, and yields strong results by mitigating the common "summer slide."

Two extra duty days at the start of the school year for the Elementary Library Technicians allowed them to be participants in the whole school initiatives that are developed during the staff meetings prior to the first day of school, enabling them to better tailor their library collections and programs to the needs at each school site.

### Resources

An allotment of \$15 per pupil for library books and materials provided print and digital resources for a broad range of reading levels and interests. Additional funds were allocated for Spanish materials at the Two-Way Immersion (TWI) and Bilingual sites. The titles are selected to be in alignment with curriculum content and library standards, promoting students' access to the materials they need for reports and research. In addition, the collections are geared to stimulating students' selections for free reading and pursuing individual interests. Included in Collection Development is support of the Preschool Book Bag program at all three BUSD Child Development Centers, providing books for students to borrow, as well as for Author/Illustrator projects throughout the school year.

Ongoing needs such as preparation of Author Study materials, support for the African American Read In, posters for the California Young Reader Medal, brochures, materials for professional development, reading promotions, and in-town transportation costs for visiting authors, are handled in the District Library Coordinator's office budget.

The Library Program provides online reference resources for students and their families through subscriptions to World Book Online and TeachingBooks.net. These digital resources are available to the entire PreK-12 student body and their families. Linked on every school library website, they offer high quality vetted information that ensures a stable stepping stone along the path of information seeking projects.

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**BERKELEY UNIFIED SCHOOL DISTRICT  
 BERKELEY SCHOOLS EXCELLENCE PROGRAM (BSEP)  
 LIBRARY PROGRAM (Measure A, Resource 0860)  
 Revenue and Expenditures  
 Comparison Report FY 2011/12**

**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:** Becca Todd

	(a)	(b)	(b) - (a)	
	Audited Actuals 2010/11 as of 6/30/11	2nd Interim Budget 2011/12 as of 1/31/12	Unaudited Actuals 2011/12 as of 6/30/12	2nd Interim Budget vs. Audited Actuals 2011/12
<b>REVENUE</b>	1,629,800	1,645,641	1,667,670	22,029
<b>EXPENDITURES</b>				
Certificated Salaries	502,372	510,789	510,248	(541)
Classified Support Salaries	451,402	464,116	460,216	(3,900)
Employee Benefits	367,412	387,079	376,514	(10,565)
Books & Supplies	174,629	166,077	154,151	(11,926)
Unallocated Reserve	0	42,680	0	(42,680)
Services & Other Operating Expenses	36,029	68,153	67,820	(333)
Indirect Costs	96,047	109,806	105,119	(4,687)
<b>TOTAL EXPENDITURES</b>	1,627,891	1,748,700	1,674,068	(74,632)
<b>NET INCREASE (DECREASE)</b>	1,909	(103,059)	(6,398)	96,661
<b>FUND BALANCE ANALYSIS</b>				
Beginning Fund Balance	560,426	562,335	562,335	0
Net Increase (Decrease) in Fund Balance	1,909	(103,059)	(6,398)	96,661
Ending Fund Balance	562,335	459,276	555,937	96,661



## **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. The job of the technicians is to support teachers and staff by keeping computers and other technology working, to help integrate technology with the curriculum, to support teachers in using PowerSchool, and to help technology committees and School Governance Councils make decisions about technology money.

BUSD classrooms contain about 2,000 computers used for instruction; the ratio of computers to students is roughly 1:5. A minimal amortized equipment cost (not including support) for these computers is \$200/year; for 1,800 computers, that amount would be \$400,000/year, a figure far in excess of the \$200,000 provided for this purpose.

Until the passage of the Measure I facilities bond in November 2010, there were no district monies outside of BSEP for the purchase of In previous years BUSD sought and received a competitive Enhancing Education Through Technology grant (EETT) that placed a 10-computer mobile cart in each elementary school, and Career Technical Education funding that brought 120 new laptop computers to Berkeley High School.

Measure I has provided funds for installing wireless throughout the district. This is very important, since in 2014-15 Smarter Balanced Assessments will completely replace the California Standards Tests (CST) as a part of the Common Core implementation, and these new tests will be completely online. It is anticipated that these tests will be given on notebook or Chromebook devices.

At the end of the 2011-12 school year, the district was approached about the desirability of a donation of 350 three-year old CPUs. These machines were indeed received in Fall 2012 and purchases in 2012-13 will include monitors and other gear for the donated computers.

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**BERKELEY UNIFIED SCHOOL DISTRICT  
 BERKELEY SCHOOLS EXCELLENCE PROGRAM (BSEP)  
 TECHNOLOGY (Measure A, Resource 0862)  
 Revenue and Expenditures  
 Comparison Report FY 2011/12**

**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

	<b>Audited Actuals 2010/11 as of 6/30/11</b>	<b>(a) 2nd Interim Budget 2011/12 as of 1/31/12</b>	<b>(b) Unaudited Actuals 2011/12 as of 6/30/12</b>	<b>(b) - (a) 2nd Interim Budget vs. Audited Actuals 2011/12</b>
<b>REVENUE</b>	728,352	735,431	745,276	9,845
<b>EXPENDITURES</b>				
Certificated Monthly Support Staff	0	24,322	24,322	0
Classified Monthly Support Staff	333,738	350,425	352,417	1,992
Employee Benefits	150,059	179,666	170,788	(8,878)
Materials & Supplies	53,506	105,565	98,490	(7,075)
Unallocated Reserve	0	2,500	0	(2,500)
Equipment	61,145	104,140	97,984	(6,156)
Services & Other Operating Expenses	50,329	12,860	10,803	(2,057)
Indirect Costs	40,678	52,225	50,572	(1,653)
<b>TOTAL EXPENDITURES</b>	689,455	831,703	805,376	(26,327)
<b>NET INCREASE (DECREASE)</b>	38,897	(96,272)	(60,100)	36,172
<b>FUND BALANCE ANALYSIS</b>				
Beginning Fund Balance	59,906	98,803	98,803	0
Net Increase (Decrease) in Fund Balance	38,897	(96,272)	(60,100)	36,172
Ending Fund Balance	98,803	2,531	38,703	36,172

## APPENDIX to BSEP FUND 4 ANNUAL REPORT

### BSEP Funds 5, 6, 7, 8

#### Budget Manager: William Huyett, Superintendent

In addition to the BSEP/Measure A Funds accounted for in this report in the BUSD Fund 4, there were small balances of residual monies remaining from prior measures in Funds 5, 6 and 7 of BSEP *Measure B of 1994* and in Fund 8 of *Measure B of 2004*.

Carryover funds were available for expenditure in FY 2011-12, and funds also remained available for adjustments generated by the Alameda County Tax Collector. No new revenue, other than a small amount of interest income, was received in FY 2011-12 for these accounts.

#### **BSEP Fund 5** (BSEP Site Enrichment and BSEP Implementation)

A fund balance of \$24,732 remained at the close of FY 2010-11. Expenditures in BSEP Fund 5 in 2011-12 were **\$12,737**. These funds were expended by those sites that had remaining Site Enrichment fund balances, and for employee benefits due in the BSEP Implementation program. With interest income of \$105, the remaining fund balance at year-end was **\$12,100**.

#### **BSEP Fund 6** (BSEP Books and Educational Materials)

A fund balance of \$195,958 remained at the close of FY 2010-11. Expenditures in BSEP Fund 6 in FY 2011-12 were **\$55,514**. The funds were used for books and educational materials for High Five classrooms and the district reading program. With interest income of \$731, the remaining Fund Balance at year-end was **\$141,175**.

#### **BSEP Fund 7** (BSEP Buildings and Grounds Improvement)

A fund balance of \$10,005 remained at the close of FY 2010-11. Expenditures in BSEP Fund 7 in FY 2011-12 were **\$1,394** for minor facilities improvements to a music room at the high school. With interest income of \$44, the remaining Fund Balance at year-end was **\$8,655**.

#### **BSEP Fund 8** (BSEP *Measure B of 2004*)

A fund balance of \$9,665 remained at the close of FY 2010-11. No expenditures were made in FY 2011-12. With interest income of \$40, the remaining Fund Balance at year-end was **\$9,705**.