

BERKELEY UNIFIED SCHOOL DISTRICT

TO: BSEP Planning and Oversight Committee
FROM: Natasha Beery, Director of BSEP and Community Relations
DATE: December 11, 2013
SUBJECT: Annual Report of Revenue and Expenditures in FY 2012-13 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 FY2012-13, 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 measure¹.

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

After 2% of net revenue is allocated to Resource 0854, 100% of the available revenues² 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% shared by these three resources
0856	Program Evaluation	
0862	Instructional Technology	

¹ BSEP Measure A, Section 2.

² 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.

The attached Annual Report displays the revenue and expenditures of each Resource of Fund 4 at the closing of Fiscal Year (FY) 2012-13, as well as a brief description of the status of projects funded through BSEP.

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 2012/13, BSEP Measure A of 2006 provided 20% of the District's combined General Fund revenue, in the amount of \$23,904,119. In addition, carryover funds from BSEP Measure B of 1994 accounted for \$69,645 in expenditures.

STAFF RECOMMENDATION

Review and accept the annual report of 2012-13 BSEP Revenue and Expenditures from Measure A of 2006, and BSEP Measures B of 1994.

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

Overview and Status Report

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 measure². 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 additional detail on the on the projects funded by each BSEP resource.

Comparison Report

Following the overview of each resource is a **Comparison Report** which shows expenditures from FY 2011-12, compared to the FY 2012-13 budget (revised at second interim, January 31 2013), the (unaudited) actuals as of June 30, 2013, and the variance between the budget and actuals. This comparison report also shows a Fund Balance Analysis.

Budget, First Interim, Second Interim, and Actual (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, a first and second interim budget (at 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.

Indirect Costs

Each BSEP resource is charged for Indirect Costs. The Indirect Cost rate in FY2012/13 was 6.39% and is calculated by a formula determined by the State. The rate is applied to all expenses and transfers and totaled \$1,444,558. 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 \$12,782,995 to the General Fund. The transfers funded 127.46FTE to reduce class sizes and 4.56FTE for music teachers providing General Fund release time. The transfers also supported costs associated with the increased FTE.

Fund Balance and Reserves

A fund balance is maintained in a central resource (0000), to meet the 3% reserve required by the State. The fund balance totaled \$918,432 at the end of FY 2012/13, a reserve of 3.7%. In addition, there are Fund Balances for each resource, managed by the program supervisors and District administration.

¹ BSEP Measure A, Section 5.C

² BSEP Measure A, Section 5.A

**BSEP/Measure A of 2006
Revenue Allocation Summary
FY 2012/13**

				(1)	(2)	
	Res	%	Budget	Calculated Actuals	Unaudited Actuals as of 6/30/12	Variance
Revenue						
County Tax Collections			24,250,000	24,392,199		
City of Berkeley Tax Collections			100,000	211,865		
Rebates/Reduction in PY Receivable			(75,000)	(75,500)		
Interest			40,000	14,337		
Total Projected Revenue			<u>24,315,000</u>	<u>24,542,901</u>		
Expenses						
County Collection Fees			412,250	411,018		
City of Berkeley Fees			50,000	48,400		
Misc. Expense			0	0		
Audit and Legal Expense			6,000	4,840		
Total Expenses			<u>468,250</u>	<u>464,258</u>		
Net Revenue			23,846,750	24,078,643		
Reserve/Incremental Reserve			0	130,432		
Net Revenue after Reserve			<u>23,846,750</u>	<u>23,948,211</u>		
Available for Allocation			23,846,750	23,948,211		
Public Information/P&O	0854	2.00%	(476,935)	(478,964)		
Net Available for Allocation			<u>23,369,815</u>	<u>23,469,247</u>		
Resource Allocation						
			(a)		(b)	(b)-(a)
Class Size Reduction	0841	66.00%	15,424,078	15,489,704	15,489,704	65,626
Site Discretionary	0852	10.25%	2,395,406	2,405,598	2,406,103	10,697
Music/VAPA	0853	6.25%	1,460,613	1,466,828	1,466,852	6,239
Parent Outreach	0857	1.25%	292,123	293,366	293,366	1,243
Libraries	0860	7.25%	1,694,312	1,701,520	1,701,520	7,208
PD/Evaluation/Technology (9%)						
Prof. Development	0855	3.24%	757,182	760,404	760,403	3,221
Evaluation	0856	2.52%	588,919	591,425	591,426	2,507
Technology	0862	3.24%	757,182	760,404	760,403	3,221
Net Resource Allocation			<u>23,369,815</u>	<u>23,469,248</u>	<u>23,469,777</u>	<u>99,962</u>
Public Information/P&O	0854		476,935	478,964	478,964	2,029
Total Allocation to All Resources			<u>23,846,750</u>	<u>23,948,212</u>	<u>23,948,741</u>	<u>101,991</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.

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

OVERVIEW

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: Javetta Cleveland and Neil Smith
Interim Co-Superintendents (FY 2012-13)**

REVENUE TRANSFERS TO THE GENERAL FUND²

	<u>Budget</u>	<u>Actual</u>	<u>Variance</u>
Teacher Compensation (127.46 FTE)	(11,263,600)	(11,729,105)	(465,505)
Substitute Compensation	(220,400)	(231,080)	(10,680)
Direct Support³	(372,000)	(376,324)	(4,324)

EXPENDITURES

	<u>Budget</u>	<u>Actual</u>	<u>Variance</u>
Certificated Teacher Salaries	2,007,335	1,656,658	(350,677)

At closing, part of the expense for ULSS/RtI teachers was transferred to the General Fund from BSEP Fund 0841. This amounted to about \$356,000, equivalent to 5.0 FTE, when salaries and benefits are included. This transfer was done in order to maintain the same level of special education expenditures from year to year as required by the state, as there had been a decrease in other expenditures due to sending fewer students to non-public schools.

¹BSEP Measure A, Section 3A.

² 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.

³ Operational and other costs associated with opening and maintaining additional classrooms.

	<u>Budget</u>	<u>Actual</u>	<u>Variance</u>
Certificated Counselor Salaries (4.8 FTE)	381,808	378,281	(3,527)
Employee Benefits	725,312	576,992	(148,320)
Indirect Costs	950,129	955,205	(5,076)
	<u>Beginning</u>	<u>Ending</u>	<u>Variance</u>
Fund Balance	1,315,750	901,809	(413,941)

RESOURCE SUMMARY:

As with other BSEP Resources, the General Fund paid for the increased cost of employees for the directly charged salaries, amounting to approximately \$132,500 for this resource. The transfers to the General Fund from 0841 (CSR) were increased by the average teacher cost based on the bonus and increased salaries. This meant an increase of about \$465,000 to the CSR fund. The transfer of costs to the General Fund for part of the ULSS/RtI expense also offset some of the deficit spending in this resource, but the overall trend at this point is toward deficit spending, with significant reduction of the fund balance this year.

STATUS REPORT

The BSEP Class Size Reduction (CSR) funds allowed for the funding of 127.46 FTE for classroom teachers. This represents over 30% of the teaching staff in the district. Class size reduction goals, as specified in the Measure, were met in FY 2012-13. 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 \$2.6 million in FY 2012-13.

Without the Class Size Reduction funds, average classroom sizes funded by the General Fund would be 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 2012-13 there were sufficient funds to meet the class size reduction goals stipulated in the BSEP Measure, and also provide Middle School Counseling, teachers for Expanded Course Offerings (ECO) and staff for Program Support.” These expenses were charged directly to the BSEP Resource 0841. In FY 2012-13, these funds provided for:

- Middle School Counselors 4.80 FTE
- BHS Expanded Course Offerings: 6.40 FTE
- Middle School Expanded Course Offerings: 1.60 FTE
- Elementary Literacy Coaches 3.30 FTE
- 3/4/5 TWI Combination Classes (3 schools) 1.80 FTE
- BHS Math Teachers (lower class size) 2.0 FTE
- Middle School Math Teachers 3.80 FTE
- *Elementary ULSS/RtI Teachers* 5.50 FTE*
- Middle School ULSS/RtI 5.50 FTE

*At fiscal year closing, \$356,000, equivalent to 5.0 FTE of elementary ULSS/RtI expense, was shifted to the General Fund, as explained in the Resource Summary.

BERKELEY UNIFIED SCHOOL DISTRICT
BERKELEY SCHOOLS EXCELLENCE PROGRAM (BSEP)
CLASS SIZE REDUCTION (Measure A, Resource 0841)
Revenue and Expenditures
Comparison Report FY 2012/13

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		
Actuals	Adopted	2nd Interim	Unaudited		
2011/12	Budget	Budget	Actuals		
as of	2012/13 as of	2012/13 as	2012/13 as		
6/30/12	7/1/12	of 1/31/13	of 6/30/12		
			Budget vs.		
			Audited		
			Actuals		
			2012/13		
REVENUE					
Revenue	15,181,547	15,424,078	15,424,078	15,489,704	65,626
BSEP Contribution to General Fund (1)	(11,452,756)	(11,160,000)	(11,263,600)	(11,729,105)	(465,505)
BSEP Substitute Compensation (1)	(226,767)	(217,700)	(220,400)	(231,080)	(10,680)
BSEP Direct Support (2)	(387,384)	(372,000)	(372,000)	(376,324)	(4,324)
NET REVENUE	3,114,640	3,674,378	3,568,078	3,153,195	(414,883)
EXPENDITURES					
Certificated Monthly Salaries (3)	1,370,631	1,787,598	2,007,335	1,656,658	(350,677)
Certificated Counselors Salaries (3)	322,220	388,379	381,808	378,281	(3,527)
Employee Benefits (3)	491,481	690,641	725,312	576,992	(148,320)
Unallocated Reserve	0	226,782	5,453	0	(5,453)
Indirect Costs	954,833	941,643	950,129	955,205	5,076
TOTAL EXPENDITURES	3,139,165	4,035,043	4,070,037	3,567,136	(502,901)
NET INCREASE (DECREASE)	(24,525)	(360,665)	(501,959)	(413,941)	88,018
FUND BALANCE ANALYSIS					
Beginning Fund Balance	1,340,275	1,315,750	1,315,750	1,315,750	0
Net Increase (Decrease) in Fund Balance	(24,525)	(360,665)	(501,959)	(413,941)	88,018
Ending Fund Balance	1,315,750	955,085	813,791	901,809	88,018

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.

SCHOOL SITE DISCRETIONARY PROGRAMS

(BSEP Measure A, Resource 0852)

OVERVIEW

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
Mary Hurlbert and Valerie Tay, BSEP Program Specialists**

The budgeted revenue allocated to the BSEP School Discretionary program in FY 2012-13 was \$2,395,406.² The expenditure budget of \$2,892,425 was funded by this new revenue and part of the School Discretionary Fund Balance³, allowing for allocations to the sites of \$233 per pupil. In addition, most sites had budget savings⁴ from FY 2011-12 that carried over and were available for expenditure in FY 2012-13.

Each School Governance Council (SGC) 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.

Staffing (70.6% of total actual expenditures)

Budget: \$1,871,994 Actual: \$1,657,258 Variance: 214,736

Certificated salaries	\$ 698,439
Classified salaries	\$ 588,156
Employee benefits	\$ 370,663

¹ BSEP Measure A, Section 3.B.i

² 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. Independent Study enrollment is deducted from Berkeley High's CBEDs enrollment. For FY 2012-13, the adjusted projected enrollment was 9,714 students.

³ The **Fund Balance** consists of monies that are held centrally, as well as unspent balances from the prior year. The Fund Balance may be held in reserve for future needs, or may be allocated to the sites for their use. The ending Fund Balance from FY 2011-12 totaled \$551,659. \$9,714 of this fund balance was allocated to sites in the budget process, and \$444,438 was posted in FY 2012/13 as carryover once the books were closed. The fund balance was reduced when indirect costs of \$28,400 associated with carryover, were posted in FY 2012/13. The net effect was to use \$482,552 of the fund balance in FY 2012/13.

⁴ **Budget savings** are funds that were budgeted but unspent during the year. These balances become available as "Carryover," once the books are closed at end of fiscal year. Carryover is posted to that school's budget in September and may be allocated by the School Governance Council in accordance with the School Site Plan.

Books and Supplies (11.9% of total expenditures)

Budget: \$468,936 *Actual:* \$279,532 *Variance:* (189,404)

Contracted Services (11.5% of total expenditures)

Budget: 326,679 *Actual:* \$269,863 *Variance:* (56,816)

Indirect Costs

Budget: \$172,122 *Actual:* \$141,000 *Variance* (\$31,122)

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) unspent hourly work budgets and instructional materials budgets, 3) carryover funds left unallocated, and 4) planned savings by an SGC.

Fund Balance

Beginning: \$551,659 *Ending:* \$610,109 *Increase:* \$58,450

RESOURCE SUMMARY:

Some school sites obtained slightly more funding than prior years due to enrollment increases at the sites, but other sites, such as Berkeley High, had lower student numbers and found it difficult to allocate funds to continuing programs or to consider new programs.

At the end of 2012-13, unexpended funds in the BSEP School Discretionary budgets ranged from a low of \$1,481 at B-Tech to a high of \$99,438 at Berkeley High. All BSEP School Discretionary dollars allocated, but unspent, by the sites at the end of FY 2012-13, have been carried over to this year's site budgets for expenditure in FY 2013-14.

As with all BSEP resources, the General Fund paid for the increased cost of employees for the directly charged salaries, amounting to an estimate of \$62,500 for this resource.

STATUS REPORT

The School Site Discretionary funds continued a broad variety of programs during the school day and before and after school. The resource played a significant role in funding positions and contracts providing academic and social-emotional support in the schools. Additionally, discretionary funds were allotted for enrichment and experiential learning opportunities in the form of art and music classes, gardening programs, and field trips. In several cases, BSEP funds provided over 50% of instructional materials and equipment at the school sites, for an average of 34.5% district-wide. Although no two School Plans were alike, BSEP-funded resources primarily supported the District goals of improving academic achievement and promoting student success.

Summary of Programs Funded

- **Academic Support:**
 - **Pre-K:** Bookbag Literacy Program;

- **K-5:** Instructional Assistants, Literacy Coaches, English Language Development (ELD), and Bilingual Support Teachers, in-school and afterschool academic intervention & tutoring programs, CalCorps BUILD tutors, reading program coordinator;
- **6-8:** Read 180 Teacher, WriterCoach Connection programs, Academic Counselors;
- **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):**
 - Substitutes to release Pre-K teachers and IAs to collaborate with “Creative Curriculum” teams.
 - Substitutes for Staff Professional Development
- **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, RtI teaching/coordination, Mosaic Project diversity awareness program, Noon Supervisors;
 - **6-8:** RtI 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 9th & 10th 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 and Art classes;
 - **K-5:** Visual Arts, Dance, Music, and Drama classes, Physical Education instruction, Arts Coordinator, Berkeley YMCA P.E. & recess program,
 - **6-8:** Art Teacher, afterschool performing arts and media classes, afterschool athletics,
 - **9-12:** BHS Video program and Afro-Haitian Dance class.

- **Other Enriching Programs:**
 - **Pre-K:** Kindergarten visits, field trip transportation and admissions;
 - **K-12:** garden programs and Americorps; garden volunteers, Computer Teacher, field trips, such as Sierra Outdoor School.
- **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 ENRICHMENT PROGRAM (Measure A, Resource 0852)
 Revenue and Expenditures
 FY 2009/10-1st Interim 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: Nancy Hoeffler/Neil Smith

	Audited Actuals FY 09/10	Unaudited Actuals FY 10/11	1st Interim Budget FY 11/12
Projected Number of Students (Adjusted CALPADS)	9,308	9,538	9,814
REVENUE	2,295,502	2,304,201	2,326,596
EXPENDITURES			
Certificated Salaries	570,937	693,324	741,081
Classified Salaries	584,474	610,629	647,330
Employee Benefits	350,124	392,690	448,872
Books and Supplies	191,419	238,981	257,723
Contracted Services	211,369	229,389	327,266
Indirect Costs	111,447	135,684	184,460
Reserve for Variances and Carryover	0	0	362,116
TOTAL EXPENDITURES	2,019,770	2,300,697	2,968,848
NET INCREASE (DECREASE)	275,732	3,504	(642,252)
FUND BALANCE ANALYSIS			
Beginning Fund Balance, July 1	410,237	685,969	689,473
Net Increase(Decrease) in Fund Balance	275,732	3,504	(642,252)
Ending Fund Balance, June 30	685,969	689,473	47,221

Notes

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

OVERVIEW

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 programs”¹

Budget Managers: Neil Smith, Assistant Superintendent for Educational Services
Suzanne McCulloch, VAPA Program Supervisor

Release Time Teachers: Transfer to General Fund

Budget: \$404,100 Actual: \$446,446 Variance: \$42,346

- Release Time Teachers: 4.56 FTE

Fourth and fifth grade students receive music instruction twice per week during two of the five contractually required preparation time periods of the classroom teachers, with **4.56** FTE funded by BSEP as a transfer to the General Fund. As enrollment in 4th/5th grade grows, so does the number of required release time FTE, increasing from 4.16 FTE in 2011-12 to 4.56 FTE in 2012-13. This year the costs associated with the raise and bonus compounded the increase, accounting for just over half of the \$42,346 variance.

Certificated Salaries

Budget: \$650,204 Actual: \$645,735 Variance: (\$4,469)

- Supplemental Music Teachers: 4.64 FTE
- Middle School Music Teachers: 2.60 FTE
- Middle School Arts: 0.24 FTE
- Elementary Arts Anchor: 0.35 FTE
- Program Supervisor: 1.0 FTE

Classified Salaries

Budget: \$49,767 Actual \$50,084 Variance: \$317

- Music Library Coordinator: 1.0 FTE

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

Employee Benefits:

¹ BSEP Measure Section 3.B.ii.b

Budget: \$196,719 *Actual: \$181,672* *Variance: (\$15,047)*

Instructional Materials, Instruments and Equipment

Budget: \$66,112 *Actual: \$60,253* *Variance: (5,859)*

Conference/Mileage/Instructional Contracts

Budget: \$128,277 *Actual: 86,923* *Variance (41,354)*

Funds were available for each elementary school site for professional development in the arts; however not all sites participated in the program in FY 2012-13.

Indirect Costs

Budget: \$95,385 *Actual: \$ 94,297* *Variance: (\$1,088)*

Fund Balance

Beginning: \$375,400 *Ending: \$272,256* *Decrease: \$103,144*

RESOURCE SUMMARY

The cost of transfers to the General Fund was increased by the calculation of average teacher cost, based on the 2012/13 bonus and increased salaries, accounting for \$21,259 in increased charges to this resource. The General Fund took on the increased cost of employees for the directly charged salaries, estimated to be \$38,500.

Despite the partial relief from the General Fund, the fund balance for this resource has decreased by over 27% over the prior year, as compared to 13% and 16% in prior years. The primary driver of the deficit spending is associated with the increased FTE for music teachers (both transfer and directly charged) due to enrollment increases. A total of 2,164 fourth-eighth grader students participated in the Music Program, an increase of 15.6% in two years. Enrollment in grades 4-8 music classes increased by 207 students (10.6%) between 2011-12 and 2012-13; FTE increased accordingly by 0.76 FTE. Instruments and materials were provided for the additional students at a cost of \$95,000.

In addition to the music teachers paid for as a transfer to the General Fund, supplemental music teachers for grades 4 and 5 provide more 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 eight different instruments taught in the same class. In total, the FTE for the fourth and fifth grade music program requires 9.2 FTE.

The allocation to this resource is driven by tax receipts, and is not tied to student enrollment. In order to maintain the resource for the remainder of the measure, it will be necessary to consider choices such as: relief from the General Fund of FTE-associated costs of the transfer to the general fund; redistribution of up to 10% from the linked library and/or parent outreach resources; and/or a substantial reduction in the music program.

STATUS REPORT

BSEP funding for Visual and Performing Arts is the foundation of the Arts programming in BUSD elementary and middle schools.

The core program supported by BSEP VAPA funds are:

- Staffing and materials for the grades 4-8 Music Program, including music classes for all fourth and fifth graders, and in addition, materials for all third 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 at eleven elementary schools;
- Professional development for classroom teachers in arts integration at seven elementary schools and one middle school;
- Professional development for music and arts teachers;
- Staffing support for outreach programs such as Arts on The Run, Kennedy Center Partnership with Cal Performances, Cazadero Music Camp, The Music Connection, the Performing Arts Showcase, and scholarships and tutors for students in need.

Highlights of the Music and VAPA program from the past year include:

- All fourth and fifth graders participated in the program, regardless of their parent's ability to pay. Options were expanded to include ukulele, guitar and mariachi instruction.
- 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 planned and transcribed music for a culturally relevant supplemental music book which includes a play along CD. The tunes were composed by BUSD alums.
- Music teachers designed PBIS "You Rock" and "Out of Tune" slips which they are using successfully with their grade 3-8 students.
- 225 students played the National Anthem at a Giants game in May.
- Collaborative partnerships provided workshops, tutoring, and performances by professional musicians for Berkeley students K-12.
- Six middle school band and orchestras competed at the regional level at California Music Educator Association festivals.
- The middle school jazz bands played at Freight and 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 2000 family and community members attended the Performing Arts Showcase in March.

BERKELEY UNIFIED SCHOOL DISTRICT
BERKELEY SCHOOLS EXCELLENCE PROGRAM (BSEP)
MUSIC , VISUAL AND PERFORMING ARTS (Measure A, Resource 0853)
Revenue and Expenditures
Comparison Report FY 2012/13

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

	(a)	(b)	(b)-(a)		
	Audited	2nd Interim	Unaudited	2nd	Interim
	Actuals	Budget	Actuals	Budget	vs.
	2011/12	2012/13	2012/13	2012/13	Audited
	as of	as of	as of	as of	Actuals
	6/30/12	7/1/12	1/31/13	6/30/12	2012/13
REVENUE					
Revenue	1,437,765	1,460,613	1,460,613	1,466,852	6,239
Transfers to General Fund (Release Time) (1)	(382,718)	(400,100)	(404,100)	(446,446)	(42,346)
NET REVENUE	1,055,047	1,060,513	1,056,513	1,020,406	(36,107)
EXPENDITURES					
Certificated Salaries	619,039	632,782	650,204	645,735	(4,469)
Classified Salaries	52,589	54,485	49,767	50,084	317
Employee Benefits	194,944	210,346	196,719	181,672	(15,047)
Instructional Materials/Instruments	57,620	45,000	61,463	60,253	(1,210)
Equipment	24,768	20,000	4,649	0	(4,649)
Unallocated Reserve	0	10,400	13,611	4,585	(9,026)
Conference/Mileage/Instructional Contracts	67,787	107,900	128,277	86,923	(41,354)
Capital Outlay	0	0	0	0	0
Indirect Costs	93,764	94,637	95,385	94,297	(1,088)
TOTAL EXPENDITURES	1,110,511	1,175,550	1,200,075	1,123,550	(76,525)
NET INCREASE (DECREASE)	(55,464)	(115,037)	(143,562)	(103,144)	40,418
FUND BALANCE ANALYSIS					
Beginning Fund Balance	430,864	375,400	375,400	375,400	0
Net Increase (Decrease) in Account Balance	(55,464)	(115,037)	(143,562)	(103,144)	40,418
Ending Account Balance	375,400	260,363	231,838	272,256	40,418

Notes

(1) During FY 2010/11, this resource funded 6.84 FTE for Music and Visual and Performing Arts Teachers 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

Purpose

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

Budget Managers: Neil Smith, Assistant Superintendent, Educational Services
Natasha Beery, Director of BSEP and Community Relations

Classified Salaries

<i>Budget: \$262,285</i>	<i>Actual: \$261,680</i>	<i>Variance: (\$605)</i>
--------------------------	--------------------------	--------------------------

- 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 FTE²

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

Employee Benefits

<i>Budget: \$86,496</i>	<i>Actual: \$ 84,503</i>	<i>Variance: (1,993)</i>
-------------------------	--------------------------	--------------------------

Contracted Services

<i>Budget: \$ 93,420</i>	<i>Actual: \$78,195</i>	<i>Variance: (15,225)</i>
--------------------------	-------------------------	---------------------------

Equipment and Supplies

<i>Budget: \$ 10,605</i>	<i>Actual: \$2,007</i>	<i>Variance: \$ (8,598)</i>
--------------------------	------------------------	-----------------------------

Fund Balance

<i>Beginning: \$285,628</i>	<i>Ending: \$338,207</i>	<i>Increase: \$52,579</i>
-----------------------------	--------------------------	---------------------------

RESOURCE SUMMARY:

Since the office was not fully staffed until mid-year there were savings in salaries and benefits and an increase to the fund balance. The budget was adjusted during first and second interim to account for the staffing transition. As with other BSEP Resources, the General Fund took on the increased cost of employees for the directly charged salaries, estimated to be \$14,700 for this resource. For 2013-14, some planned deficit spending will reduce the fund balance.

¹ BSEP Measure Section 6A

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

STATUS REPORT

The BSEP Office was restructured and the job descriptions were revised to encompass the full duties of the office, beginning with a plan that went to the board in June 20, 2012. The new BSEP Director was hired in November of 2012, and the BSEP Program Specialist in March 2013. During the transition, the previous BSEP Manager and BSEP Administrative Coordinator provided hourly and limited term support during the transition to the new Director of BSEP and Community Relations and BSEP Program Specialist. The core functions supported by this budget in FY 2012-13 and highlights from the past year included:

Oversight of the BSEP Budgets, and Support for the Planning and Oversight Committee

The BSEP Director and Program Specialist have responsibility for:

- Implementation and monitoring of operational and technical tasks which place the BSEP funds in the District's financial systems, working alongside the Senior Budget Analyst to ensure careful oversight of fund expenditures;
- Partnership with each school Principal and School Governance Council to analyze and develop the BSEP School Discretionary Fund budget and plan;
- Support for the September School Governance Council (SGC) elections and the appointment of P&O Representatives from each school site in October;
- Preparation of the annual SGC Election, Diversity, and Activity Report for the Board in November;
- SGC and Parent Leader Orientation Workshops in October, and Orientation for new P&O Representatives in November.
- Planning and facilitation of 14 P&O Committee meetings and five P&O Subcommittee meetings, providing documents, coordinating guest speakers, and preparation of presentations.

District Communications and Community Relations

- The BSEP Director convened the Communications Team on a biweekly basis to ensure that the recommendations of the Spring 2011 Communications Study continue to be implemented to ensure clearer and more strategic communication with families and the wider Berkeley community. The team includes staff members from Parent Outreach, Translation, Superintendent's Office, and Technology, and makes strategic use of outside contractors for some content, consultation, translation, printing, and mailing services.
- In FY 2012-13 some of the top news items that needed consistent communication and strategic community involvement, included:
 - Superintendent Search/Hire
 - District Finances/Budget
 - Two Way Immersion Program
 - Transition to Common Core
 - Cooking and Gardening
 - Admissions
- To reach our varied audiences and meet their diverse communication needs, a combination of traditional and new media tools and channels were employed, including: website, homepage blog posts, school & community postings/flyers, letters to families,

online surveys, email, phone blasts, school newsletters, community forums, and tabling at community events.

- The A+ *eNews*, produced in both English and Spanish on a bi-monthly basis, 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. In addition, limited paper copies are provided at school sites. The A+ *eNews* is sent electronically every two weeks to over 2,000 staff and over 7,000 parents and community members. It is translated into Spanish and sent to a growing list of Spanish-language subscribers (currently at **325** households).
- The website is our community's entry to information about district programs and services, departments, facilities, and new initiatives, with the most visited pages being those covering Admissions, Human Resources, 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.
- In addition to established communication channels, Online Community Surveys, Public Forums, and stakeholder group meetings provided community engagement opportunities and valuable input that informed the Superintendent Search.

New Admissions Materials

New outreach and promotional materials were developed in Fall 2012 in conjunction with the Admissions Office, and included new art work, branding, posters, post cards and invitations to participate in the admission process. This effort expanded access for families and complemented the information refreshed and developed for the website in 2011-12. The Kindergarten Fair in December 2012 was attended by a record number of families, and elementary school enrollment continues to grow.

BUSD Logo Redesign

With the move to 2020 Bonar Street, there was an opportunity to update the BUSD logo, which relied upon an image of prior building site. The Communication Team, in conjunction with Cabinet, reviewed a number of possibilities before deciding upon a simple, scalable design which focused on the word "Berkeley" in large font, with variations using the "Excellence, Equity, Engagement, Enrichment" tagline or the BUSD "official" name. The new logo has been well received.

Berkeley Schools Biannual Report

This BSEP Resource paid for the production of a fall and spring Biannual report that was mailed to all 46,000 residential addresses in Berkeley. It was also translated into Spanish, and both English and Spanish print versions were distributed at schools. 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. The Biannual Report also serves as a resource for the human resources, admissions, and other District departments involved in outreach to prospective faculty, staff, and families.

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;
- Provided community outreach related to Facilities and Maintenance Projects, including project and meeting postings at construction sites, and on the district website.
- 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.
-

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 approaches or exceeds 15% of students who are Spanish-speaking, creating increased demand for document and meeting/event interpretation. The full-time Translation and Interpretation Specialist position is co-funded 50% with the General Fund and 50% from BSEP Resource 0854. In 2012-13, the BSEP Office and specialist provided Spanish translation and interpretation to support district-wide and school site-specific communications, including:

- A+ News, Biannual Report, Flyers, Posters
- IEP documents (5 documents, over 6 pages each)
- IEP meetings (5 meetings)
- Student Services (over 30 documents)
- Interpretation for Student Services for Latino families and SARBS (5-7 meetings)
- Translation and interpretation for Superintendent Search events
- Translation and interpretation for Superintendent communications
- SGC documents for schools
- Parent-Student Handbook, and other mandated district documents
- Translations for LeConte
- Educational Service Documents: EL Master Plan, Common Core, Report Cards, Story of Units, and much more
- BEARS and LEARNS communications
- Office of Family Engagement and Equity translation and interpretation
- Interpretation for community forums, including SGC training

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.

**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 FY2012/13**

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)	(b)	(b)-(a) 2nd	(b)-(a) 2nd	(b)-(a) 2nd
	Audited Actuals 2011/12 as of 6/30/12	Adopted Budget 2012/13 as of 7/1/12	2nd Interim Budget 2012/13 as of 1/31/13	(b)	(b)-(a) 2nd
				Unaudite d Actuals 2012/13 as of 6/30/12	Interim Budget vs. Audited Actuals 2012/13
REVENUE	469,441	476,935	476,935	478,964	2,029
EXPENDITURES					
Classified & Certificated Salaries	247,030	264,231	262,285	261,680	(605)
Employee Benefits	91,205	106,032	86,496	84,503	(1,993)
Supplies/Equipment	11,120	10,500	10,605	2,007	(8,598)
Unallocated Reserve	0	36,137	56,496	0	(56,496)
Contracted Services	62,493	89,500	93,420	78,195	(15,225)
TOTAL EXPENDITURES	411,848	506,400	509,302	426,386	(82,916)
NET INCREASE (DECREASE)	57,593	(29,465)	(32,367)	52,579	84,946
FUND BALANCE ANALYSIS					
Beginning Fund Balance	228,035	285,628	285,628	285,628	0
Net Increase (Decrease) in Fund Balance	57,593	(29,465)	(32,367)	52,579	84,946
Ending Fund Balance	285,628	256,163	253,261	338,207	84,946

RESOURCE SUMMARY

The BUSD professional development program has used BSEP resources to fund professional development in conjunction with state and federal resources. This strategy has led to a relatively large fund balance in prior years. With the 2012-13 year, the balance has begun to shift toward more significant deficit spending. As with other BSEP Resources, the General Fund took on the increased cost of employees for the directly charged salaries, estimated to be \$34,200 for this resource.

STATUS REPORT

In 2012-13, Professional Development priorities included a focus on literacy, English learners, Response to Instruction and Intervention, cultural responsiveness, algebra readiness and success, support for new teachers, and preparation for the transition to the Common Core State Standards. Highlights from last year included:

- Support for the Teacher College Reading and Writing Project (TCRWP) curriculum to meet the diverse needs of K-5 students;
- Professional Learning Communities for Literacy Coaches, ensuring the implementation of best practices throughout the district;
- Workshops and coaching in Systematic ELD to improve instruction for English Learners;
- The development and use of more common assessments followed by collaborative analysis of student performance;
- Preparation for the changes in curriculum and pedagogy associated with the Common Core State Standards;
- Three-day Constructing Meaning workshops primarily at BHS to improve instructional practices and student performance;
- Three-day workshops for both certificated and classified employees in Cultural Competence;
- Training and support in implementing a system of Positive Behavioral Intervention and Support at pre-K–8 sites;
- Guidance and support for teachers to use a variety of educational technology tools, such as online tutorials, interventions, diagnostics, and other resources.

**BERKELEY UNIFIED SCHOOL DISTRICT
 BERKELY SCHOOLS EXCELLENCE PROGRAM (BSEP)
 PROFESSIONAL DEVELOPMENT
 Revenue and Expenditures (Measure A, Resource 0855)
 Comparison Report FY 2012/13**

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) 2nd		
	Audited Actuals 2011/12 as of 6/30/12	Adopted Budget 2012/13 as of 7/1/12	2nd Interim Budget 2012/13 as of 1/31/13	Unaudited Actuals 2012/13 as of 6/30/12	2nd Interim Budget vs. Audited Actuals 2012/13
REVENUE	828,084	757,182	757,182	760,403	3,221
EXPENDITURES					
Certificated Salaries	588,805	604,418	677,120	668,638	(8,482)
Classified Salaries	29,165	0	29,495	29,493	(2)
Employee Benefits	175,080	171,952	176,198	174,154	(2,044)
Materials & Supplies	0	0	176	158	(18)
Unallocated Reserve	0	68,688	24,166	0	(24,166)
Services & Other Operating Expenses	28,345	97,324	35,227	16,164	(19,064)
Indirect Costs	55,033	60,218	60,218	56,782	(3,436)
TOTAL EXPENDITURES	876,428	1,002,600	1,002,600	945,388	(57,212)
NET INCREASE (DECREASE)	(48,344)	(245,418)	(245,418)	(184,985)	60,433
FUND BALANCE ANALYSIS					
Beginning Fund Balance	424,955	376,611	376,611	376,611	0
Net Increase (Decrease) in Fund Balance	(48,344)	(245,418)	(245,418)	(184,985)	60,433
Ending Fund Balance	376,611	131,193	131,193	191,626	60,433

Notes

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

providing supplementary data analysis, assisting principals to plan or prepare data presentations to staff or School Governance Council (SGC), and supporting principals in using Illuminate, Survey Monkey or PowerSchool. In FY 2012-13, four schools also received support in piloting the new Smarter Balanced Assessment in a classroom environment.

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

- 10 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 in Illuminate for every classroom teacher, K-12
- 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 Illuminate and provided data presentation summaries for use with WASC accreditation visit. Provided data support for the Program Evaluation consultant evaluating the Small Learning Community Grant.

2020 Vision Support and Partnership: Debbi D'Angelo participated with Co-Superintendent Smith 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.

Assessment Development:

- Organized and facilitated meetings with ELA and math teacher leaders to review Common Core aligned assessments.

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 and We Care Survey: Implementation and analysis support of BFT and We Care survey to BFT members. The We Care survey was also administered to district managers and classified staff. These surveys used the BEA Survey Monkey tool.

**BERKELEY UNIFIED SCHOOL DISTRICT
 BERKELEY SCHOOLS EXCELLENCE PROGRAM (BSEP)
 EVALUATION (Measure A, Resource 0856)
 Revenue and Expenditures
 FY 2009/10 - 1st Interim 2010/11**

Mission Statement

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

	Audited Actuals FY 09/10	Unaudited Actuals FY 10/11	1st Interim Budget FY 11/12
REVENUE	482,675	485,568	490,287
EXPENDITURES			
Certificated Salaries	191,297	230,361	230,737
Classified Monthly Support Salaries	80,862	89,003	87,672
Employee Benefits	68,655	89,349	96,676
Books & Supplies	0	1,540	4,200
Reserve for Personnel Variance	0	0	5,857
Carryover	0	0	29,726
Services & Other Operating Expenses	14,800	56,182	72,500
Indirect Costs	20,767	29,245	35,334
TOTAL EXPENDITURES	376,381	495,680	562,702
NET INCREASE (DECREASE)	106,294	(10,112)	(72,415)
FUND BALANCE ANALYSIS			
Beginning Fund Balance, July 1	(23,767)	82,527	72,415
Net Increase (Decrease) in Fund Balance	106,294	(10,112)	(72,415)
Ending Fund Balance, June 30	82,527	72,415	0

Notes

PARENT OUTREACH SERVICES
(BSEP Measure A, Resource 0857)

OVERVIEW

Purpose:

Support the families of Berkeley's public school students by providing parent education and promoting greater parent involvement in their children's education¹

Budget Managers: Neil Smith, Superintendent for Educational Services, with
Charity DaMarto, Supervisor, Office of Family Engagement and
Equity (OFEE)

Staff

Budget: \$136,364 *Actual: \$135,757* *Variance: (\$607)*

- Site Coordinators 2.0 FTE
- Site Coordinator, Bilingual 1.0 FTE
- High School Parent Liaison: .27 FTE²
- Supervisor of Family Engagement .5 FTE³

This was the first implementation year of a pilot program for Parent Outreach based on a Board approved plan. A Supervisor of Family Engagement was hired in September, and two of three Site Coordinators were hired in early fall. A bilingual Site Coordinator was hired in February. The budget was developed on the assumption the positions would be filled for the entire year. The difference in salary and benefit expense was approximately \$40,000. Since the positions were filled after school started, the budget was revised at First and Second Interim to more closely reflect the actual expenses expected for the year.

Employee Benefits

Budget: \$46,527 *Actual: \$45,341* *Variance: (\$1,186)*

Books, Supplies and Equipment

Budget: \$10,000 *Actual: \$6,695* *Variance: (\$3,305)*

Books, supplies and equipment purchases were needed as part of the startup costs for the new program, as well as for day to day functions. Purchases included parent education materials and equipment for the Site Coordinators.

Services and Other Operating Expenses

Budget: \$15,800 *Actual: \$3,534* *Variance (\$12,266)*

¹ BSEP Measure A Section 3.B.iic

² Multi-funded 1.0 FTE position: .053 from Resource 0852 and .20 from EIA

³ Multi-funded 1.0 FTE position: 0.5 from Professional Development

All expenses incurred were for staff professional development. There were no expenses for contracted services out of the BSEP budget but OFEE did use a contractor was paid for out of general fund and Berkeley High Funding.

Indirect Costs

Budget: \$19,438

Actual: \$12,226

Variance: (\$7,212)

Fund Balance

Beginning: \$228,650

Ending: \$318,462

Increase: \$89,812

RESOURCE SUMMARY

The reorganization of the program during 2011-12 school year lead to a substantial increase in the fund balance. For 2013-14, this resource is budgeted for staffing for the full year, which will rely upon deficit spending from the fund balance. The General Fund paid for the increased cost of employees for the directly charged salaries, which is estimated to be \$10,200 for this resource.

STATUS REPORT

Creating a welcoming environment for all families

During the 12-13 school year the office collaborated and/or facilitated eleven events, including:

- An event at Oxford Elementary with Dr. Joy DeGruy at which families and staff learned about the relationship of African-American history to family structures today;
- Collaboration with Rosa Parks Parent Center on the annual Summer Resource Fair;
- Parent information session about the Berkeley SMASH Prep program, which serves African American males who have demonstrated both an aptitude and interest in math and science. The curriculum is designed for sixth through eighth graders and will increase the participants' college and STEM aspirations. The OFEE office contacted the parents of every fifth grade student that qualified for the program and invited them to the information session. 34 of 36 families contacted attended the event. Every family that attended, applied to the program. 17 students are currently participating in the program;
- Facilitation of a Welcoming School Walk-Through, at which the Principal and Site Coordinator assessed the school climate. This created goals for the school year.

Providing support to families of students in need of academic, behavioral, and emotional support

- The OFEE provided over 200 parents with direct services and resources which included:
 - Connection to local organizations to find housing, food, and transportation.
 - Referrals for domestic violence counseling and housing support.
 - Preparation and meeting support for SST/ IEP's
 - Review of written IEP's with parents to better understand the IEP.
- Site Coordinators documented all contact with parents at their sites. The Site Coordinators chronicled when parents came into the office and when school staff referred a family due to an issue. By highlighting how parents were referred, how parents were contacted, and the services needed, the coordinators could identify and focus on the most requested services in order to guide the work for the 2013-2014 school year.

Increasing the involvement of marginalized and under-represented parents (African-American, Latino and parents who are not proficient in English)

- The OFEE began to define and assess how the district, schools, staff, and parents described “parent involvement”. Most parents are “involved” but certain types of volunteering or being on a site committee were seen as more “involved”. The site coordinators initiated conversations on what it means to be an “involved” parent.
- The OFEE formed two new ELACs, and two African-American parent groups. At one site, the OFEE was involved in recruiting more parents of color to the SGC.

**BERKELEY UNIFIED SCHOOL DISTRICT
 BERKELEY SCHOOLS EXCELLENCE PROGRAM (BSEP)
 PARENT OUTREACH (Measure A, Resource 0857)
 Revenue and Expenditures
 Comparison Report FY 2012/13**

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

	Audited Actuals 2011/12 as of 6/30/12	Adopted Budget 2012/13 as of 7/1/12	(a) 2nd Interim Budget 2012/13 as of 1/31/13	(b) Unaudited Actuals 2012/13 as of 6/30/12	(b)-(a) 2nd Interim Budget vs. Audited Actuals 2012/13
REVENUE	287,529	292,123	292,123	293,366	1,243
EXPENDITURES					
Staff	83,527	173,912	136,364	135,757	(607)
Employee Benefits	30,993	86,610	46,527	45,341	(1,186)
Books & Supplies	3,472	4,000	8,880	6,225	(2,655)
Equipment	0	0	1,120	470	(650)
Unallocated Reserve	0	9,618	95,498	0	(95,498)
Services & Other Operating Expenses	24,949	28,000	15,800	3,534	(12,266)
Indirect Costs	9,578	19,307	19,438	12,226	(7,212)
TOTAL EXPENDITURES	152,519	321,447	323,627	203,554	(120,073)
NET INCREASE (DECREASE)	135,010	(29,324)	(31,504)	89,812	121,316
FUND BALANCE ANALYSIS					
Beginning Fund Balance	93,640	228,650	228,650	228,650	0
Net Increase (Decrease) in Fund Balance	135,010	(29,324)	(31,504)	89,812	121,316
Ending Fund Balance	228,650	199,326	197,146	318,462	121,316

SCHOOL LIBRARIES
(BSEP Measure A, Resource 0860)

OVERVIEW

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: Neil Smith, Assistant Superintendent, Educational Services
Becca Todd, District Library Coordinator

Certificated Salaries

<i>Budget: \$530,837</i>	<i>Actual: \$537,907</i>	<i>Variance: \$7,070</i>
• 3 Middle School Teacher Librarians	3.0 FTE	
• 2 High School Teacher Librarian	2.0 FTE	
• Continuation High School Librarian	0.6 FTE	
• District Library Coordinator	1.0 FTE	

Classified Salaries

<i>Budget: \$475,094</i>	<i>Actual: \$460,609</i>	<i>Variance: (\$14,485)</i>
• 11 Elementary Library Media Technicians	8.80 FTE	
• 2 Middle School Library Media Technicians	1.06 FTE	
• Middle School Library Media Technician	0.8 FTE	
• Central Media Library Technician	0.8 FTE	
• High School Library Media/Textbook Technician	0.8 FTE	

Employee Benefits

<i>Budget: \$377,362</i>	<i>Actual: \$369,929</i>	<i>Variance: (\$7,433)</i>
--------------------------	--------------------------	----------------------------

Books and Supplies

<i>Budget: \$154,105</i>	<i>Actual: \$137,200</i>	<i>Variance (16,905)</i>
--------------------------	--------------------------	--------------------------

Services and Other Operating Expenses

<i>Budget: \$97,953</i>	<i>Actual: \$92,227</i>	<i>Variance: (\$5,726)</i>
-------------------------	-------------------------	----------------------------

Indirect Costs

<i>Budget: \$108,316</i>	<i>Actual: \$103,288</i>	<i>Variance: (\$5,028)</i>
--------------------------	--------------------------	----------------------------

Fund Balance

<i>Beginning: \$555,937</i>	<i>Ending: \$537,763</i>	<i>Decrease: \$18,174</i>
-----------------------------	--------------------------	---------------------------

¹ BSEP Measure A, Section 3.B.ii.

RESOURCE SUMMARY

The relative strength of the fund balance allowed a slight increase in expenditures over FY 2011-12. There were only small variances from the plan budget, with some increases in Teacher Librarian salaries due to the need for a substitute, additional expenditures for professional development, and more spent on contracts due to the initial expense of a change in library management software. In FY 2013-14, the fund balance is supporting a 0.1 FTE increase for library media technicians at each of the six largest elementary schools and one 0.5 FTE Teacher Librarian for the elementary schools. As with all BSEP resources, the General Fund paid for the increased cost of employee salaries, estimated to be \$54,300 for this resource.

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. Following are highlights from FY 2012-13.

Student engagement

The BUSD libraries promote a strong reading culture with print and digital resources aligned to curricular assignments, as well as reader interest and initiative. Close to 244,000 books were circulated in the K-12 schools in 2012-13, up from 208,000 during the prior year. The continued allocation of \$15 per pupil for library books and materials allowed the program to address the broad range of reading levels and interests of students and staff. There were highlighted authors and illustrators of many cultures and ethnicities, going beyond the annual heritage months.

Subscriptions to WorldBook Online and TeachingBooks.net were provided districtwide; the middle schools also have a subscription to Teen Health and Wellness; the high schools have additional subscriptions to ABC-Clio, Gale Virtual Reference, Opposing Viewpoints, and ProQuest. Each library webpage provides direct links to these useful resources and as well as other appropriate resources on the open web. Digital citizenship and cyber safety skills are addressed when guiding students to use online resources.

The Preschool Book Bag Lending Library got off to a late start last year, yet emerged stronger than ever. The Book Bag staff established consistent morning and afternoon hours that better supported the preschool rhythm of the day, ensuring that all students had a weekly opportunity to hear an additional story and exchange a book for home reading.

Many libraries have an active Student Library Assistant program, establishing positive work habits and customer service relations in addition to a deeper understanding of library resources and organization. Student artwork and suggestions of "Recommended Reads" are often on display. Providing a communal venue to be able to view large projects such as "The Museum of Extraordinary Women" enables student work to be appreciated beyond the individual classroom.

The BEARS Summer School Library program continued in the summer of 2013, with a Library Media Technician at both BEARS/EDC summer school sites (this year BAM 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.”

New staff and new library system

New library staff were welcomed at BAM, BHS, Longfellow, Malcolm X and Willard. The new library management system, *Destiny*, provides online access from any internet connected device, and integrates resources from our online databases. In addition to the usual topic and title searches, reading levels of Fountas and Pinnell or Lexile can be added as search limiters. The initial purchase and conversion was costly; subsequent years will see only an ongoing maintenance fee. Working with a new automation system, library staff support 9,500+ students with a welcoming, robust, and challenging library program.

Community Collaboration

BUSD libraries collaborate with the Berkeley Public Library to promote book clubs, individual library cards, online database research and summer reading. We host the Rotary Club’s third grade Dictionary Distribution. We sponsor author and illustrator visits; during the 2012-13 school year we were fortunate to have visits from Annie Barrows, Cory Doctorow, Reyna Grande, Jennifer Holm, Vaunda Nelson, Raina Telgemeier, and Doug TenNaple, with a Skype visit with Adam Gidwitz to boot.

**BERKELEY UNIFIED SCHOOL DISTRICT
BERKELEY SCHOOLS EXCELLENCE PROGRAM (BSEP)
LIBRARY PROGRAM (Measure A, Resource 0860)
Revenue and Expenditures
Comparison Report FY 2012/13**

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	Unaudited	2nd		
	Actuals	Actuals	Interim		
	2011/12	2012/13	Budget vs.		
	as of	as of	Audited		
	6/30/12	7/1/12	Actuals		
	of	of	2012/13		
	6/30/12	7/1/12	2012/13		
	of	1/31/13	2012/13		
REVENUE	1,667,670	1,694,312	1,694,312	1,701,520	7,208
EXPENDITURES					
Certificated Salaries	510,248	513,738	530,837	537,907	7,070
Classified Salaries	460,216	471,216	475,094	460,609	(14,485)
Employee Benefits	376,514	388,587	377,362	369,929	(7,433)
Books & Supplies	154,151	145,300	154,105	137,200	(16,905)
Equipment	0	25,000	31,142	18,533	(12,609)
Unallocated Reserve	0	32,737	33,853	0	(33,853)
Services & Other Operating Expenses	67,820	112,900	97,953	92,227	(5,726)
Indirect Costs	105,119	107,622	108,316	103,288	(5,028)
TOTAL EXPENDITURES	1,674,068	1,797,100	1,808,662	1,719,694	(88,968)
NET INCREASE (DECREASE)	(6,398)	(102,788)	(114,350)	(18,174)	96,176
FUND BALANCE ANALYSIS					
Beginning Fund Balance	562,335	555,937	555,937	555,937	0
Net Increase (Decrease) in Fund Balance	(6,398)	(102,788)	(114,350)	(18,174)	96,176
Ending Fund Balance	555,937	453,149	441,587	537,763	96,176

Beginning: \$38,703

Ending: 38,070

Decrease: \$633

RESOURCE SUMMARY

Total expenditures for the BSEP Technology Resource were lower in FY 2012-13 than in FY 2011-12. While the higher expenditures for materials, supplies and equipment in FY 2011-12 created a \$60,100 decrease in the fund balance, deficit spending in 2012-13 was minor. The reduction was primarily the result of reduced expenditures for materials, supplies and equipment, from \$196,500 in FY 2011-12 to \$124,700 in FY 2012-13, a reduction of \$71,700. In 2012-13, expenditures for salaries and benefits increased by \$40,700 primarily due to a 0.4 FTE increase in classified staff. As with all BSEP resources, the General Fund paid for the increased cost of employees for the directly charged salaries, estimated to be \$23,700 for this resource.

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 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 PowerSchool and IlluminateEd, 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. This will provide crucial infrastructure when 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 on 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 included monitors and other gear for the donated computers.

BERKELEY UNIFIED SCHOOL DISTRICT
BERKELEY SCHOOLS EXCELLENCE PROGRAM (BSEP)
TECHNOLOGY (Measure A, Resource 0862)
Revenue and Expenditures
Comparison Report FY 2012/13

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

	(a)		(b)		(b)-(a) 2nd
	Audited		2nd Interim	Unaudited	Interim
	Actuals	Adopted	Budget	Actuals	Budget vs.
	2011/12	Budget	2012/13	2012/13	Audited
	as of	2012/13 as	as of	as of	Actuals
	6/30/12	of 7/1/12	1/31/13	6/30/12	2012/13
REVENUE	745,276	757,182	757,182	760,403	3,221
EXPENDITURES					
Certificated Monthly Support Staff	24,322	18,963	24,565	24,566	1
Classified Monthly Support Staff	352,417	355,709	379,205	379,623	418
Employee Benefits	170,788	180,152	184,943	184,296	(647)
Materials & Supplies	98,490	50,000	85,628	80,701	(4,927)
Unallocated Reserve	0	49,642	2,491	0	(2,491)
Equipment	97,984	45,000	44,326	44,041	(285)
Services & Other Operating Expenses	10,803	10,000	2,200	2,100	(100)
Indirect Costs	50,572	45,334	45,637	45,709	72
TOTAL EXPENDITURES	805,376	754,800	768,995	761,036	(7,959)
NET INCREASE (DECREASE)	(60,100)	2,382	(11,813)	(633)	11,180
FUND BALANCE ANALYSIS					
Beginning Fund Balance	98,803	38,703	38,703	38,703	0
Net Increase (Decrease) in Fund Balance	(60,100)	2,382	(11,813)	(633)	11,180
Ending Fund Balance	38,703	41,085	26,890	38,070	11,180

APPENDIX to BSEP ANNUAL REPORT

BSEP Funds 5, 6, 7, 8

Budget Managers: Javetta Cleveland and Neil Smith, Interim Co-Superintendents

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

Carryover funds were available for expenditure in FY 2012-13, and funds also remained available for adjustments generated by the Alameda County Tax Collector. There was no new revenue, other than a small amount of interest income. However, the County Tax Collection office reduced prior revenue received in each of the Funds under the "Teeter Plan" of adjustments. A financial summary for each Fund is attached and explained as follows:

BSEP Fund 5 (BSEP Site Enrichment and BSEP Implementation)

There were no expenditures in BSEP Fund 5 in 2012-13. A fund balance of \$12,100 remained at the close of FY 2011-12, however revenue adjustments reduced the fund balance by \$672. Combined with interest income of \$30, the fund balance at year-end was **\$11,428**.

BSEP Fund 6 (BSEP Books and Educational Materials)

Funds were used to expand the range of reading materials for the Lucy Calkins Writing Program and increase the collection of non-fiction materials. Funds were also used to purchase new instruments for Berkeley High. The plan authorized expenditures for technology for the Summer Bridge program at Berkeley High School, but \$11,000 of equipment for the program was purchased in FY 2013-14, so the expense was not recognized in FY 2012-13.

A fund balance of \$141,174 remained at the close of FY 2011-12. During FY 2012-13, the fund earned \$354 in interest, but revenue adjustments of \$3,510 reduced the funds available for expenditure during the year. Expenditures for the year totaled \$120,681, leaving a fund balance at year end of **\$17,338**.

BSEP Fund 7 (BSEP Buildings and Grounds Improvement)

Expenditures in BSEP Fund 7 in FY 2012-13 totaled \$6,206 and were used to fund architectural services for Berkeley High School and King Middle School field improvements and stage lighting projects. Funds were also used to pay for a controller for the scoreboard at Berkeley High.

A fund balance of \$8,655 remained in Fund 7 at the close of FY 2011-12. During FY 2012-13, revenues were reduced by a revenue adjustment of \$1,170 and negative interest erroneously charged to this fund. The interest charge will be corrected in FY 2013-14. At the end of the year, the fund balance was **\$1,245**.

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

No expenditures were made in FY 2012-13. A fund balance of **\$9,705** remained at the close of FY 2011-12. The fund balance was reduced as a result of a revenue adjustment \$3,680. Combined with interest income of \$19, at the end of FY 2012-13 the fund balance totaled **\$6,045**.

Financial Summary
Funds 5-8 FY 2012/13
Unaudited Actuals FY 2012/13

	Fund 5 (a)	Fund 6 (a)	Fund 7 (a)	Fund 8 (b)
Revenue	(672)	(3,155)	(1,204)	(3,661)
Expenditures				
Books	0	109,149	0	0
Materials & Supplies	0	0	0	0
Equipment	0	11,532	1,951	0
Land	0	0	5,650	0
Buildings and Improvements	0	0	(1,394)	0
Total Expenditures	0	120,681	6,206	0
Net Increase/Decrease	(672)	(123,836)	(7,410)	(3,661)
Beginning Fund Balance	12,100	141,174	8,655	9,705
Net Increase/Decrease	(672)	(123,836)	(7,410)	(3,661)
Ending Fund Balance	11,428	17,338	1,245	6,045

(a) BSEP Measure B of 1994

(b) Measure B of 2004