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BERKELEY UNIFIED SCHOOL DISTRICT
BERKELEY SCHOOLS EXCELLENCE PROGRAM
2020 Bonar Street, Third Floor
Berkeley, CA 94702
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MEETING NOTICE

COMMITTEE: BSEP Planning & Oversight Committee
DATE: Tuesday, February 25, 2014
TIME: 7:00 p.m. Gavel down: 7:15 p.m.
LOCATION: 2020 Bonar Street, Room 126
Parking on street or in open lot at Browning and Addison St.

AGENDA

- 7:15 1. Call to Order/Introductions & Site Reports
- 2. Establish the Quorum/Approve Agenda
- 7:30 3. Chairperson’s Comments
(Chris Martin, Elisabeth Hensley)
- 4. BSEP Director’s Comments
- [Action] 5. Approval of Minutes 2.11.14
- 6. Public Comment
- [Presentation] 8:00 7. **BSEP Revenue Projection & COLA for 2014-15:**
Implications for BSEP Resources
(Natasha Beery, BSEP Director, Liz Karam, BSEP Budget Analyst)
- [Presentation] 8:40 8. **Recommendation for BSEP Funds in FY 2014-15:**
Class Size Reduction (BSEP Resource 0841)
(Neil Smith, Assistant Superintendent for Ed. Services)
- 9:30 9. Adjournment

This meeting is open to the public and subject to the Brown Act.

Next Subcommittee Meeting: Tuesday, March 4, 2014

Music and VAPA Subcommittee

7 pm, Willard Middle School, Room D19C

Next P&O Meeting: March 11, 2014

Action: Recommendation for CSR Site Funds

Discussion: LCAP Update; VAPA Funds

BSEP PLANNING & OVERSIGHT COMMITTEE MINUTES

February 11, 2014

BUSD Offices –Technology Room 126
2020 Bonar Street, Berkeley, CA 94702

P&O Committee Members Present:

Sergio Duran, <i>Arts Magnet</i>	Keira Armstrong, <i>Washington</i>
Tim Frederick, <i>Cragmont</i>	Elisabeth Hensley, <i>King (co-Chair)</i>
Boyd Power, <i>Emerson</i>	Dawn Paxson, <i>Emerson/Willard</i>
Mara Mahmood, <i>Jefferson (Sub)</i>	Margaret Phillips, <i>Willard</i>
Danielle Perez, <i>John Muir</i>	Aaron Glimme, <i>Berkeley High</i>
Darryl Bartlow, <i>John Muir (Alt)</i>	Larry Gordon, <i>Berkeley High</i>
Chris Martin, <i>LeConte (co-Chair)</i>	John Lavine, <i>Berkeley High</i>
Catherine Huchting, <i>Malcolm X</i>	Catherine Lazio, <i>Berkeley High</i>
Dan Smuts, <i>Rosa Parks (co-Rep)</i>	Ramal Lamar, <i>B-Tech</i>
Patrick Hamill, <i>Thousand Oaks</i>	Louise Harm, <i>Independent Study</i>
Radha Seshagiri, <i>Thousand Oaks (Alt)</i>	

P&O Committee Members Absent:

Moshe Cohen, <i>Pre-K</i>	Kim Sanders, <i>Longfellow</i>
Lily Howell, <i>Pre-K (Alt)</i>	Ellen Weis, <i>Longfellow</i>
Shauna Rabinowitz, <i>Jefferson</i>	Bruce Simon, <i>King</i>
Yusef Auletta, <i>LeConte (Alt)</i>	Austin Lloyd, <i>BHS (Alt)</i>
Lea Baechler-Brabo, <i>Oxford</i>	Orlando Williams, <i>BHS (Alt)</i>
Juliet Bashore, <i>Rosa Parks (co-Rep)</i>	

Visitors, School Board Directors, Union Reps, and Guests:

Mark Coplan, *BUSD Public Information Officer*
Donald Evans, *BUSD Superintendent*
Javetta Cleveland, *Deputy Superintendent*
Julie Sinai, *Board Member*
Karen Hemphill, *Board Member*

BSEP Staff:

Natasha Beery, *BSEP Director*
Valerie Tay, *BSEP Program Specialist*
Linda Race, *BSEP Staff Support*

1. Call to Order, Introductions & Site Reports

At 7:16 p.m. Co-chair Chris Martin called the meeting to order by welcoming attendees, and by asking P&O members to report on School Governance Council activity at their sites.

2. Establish the Quorum

The quorum was approved with 18 voting members initially present. 13 voting members are required for a quorum.

3. Chairperson's Comments

Chris Martin and Elisabeth Hensley

No comments were made.

4. BSEP Director's Comments

Natasha Beery, BSEP Director

No comments were made.

5. Approval of Minutes: January 28, 2014

MOTION CARRIED (Lamar/Glimme): To approve the meeting minutes of the January 28, 2014 P&O Committee Meeting.

The motion was approved with a showing of 14 hands, with no objections, and 4 abstentions.

6. Public Comment

No comments were made.

7. Subcommittee Reports: Library/Technology Subcommittee, Music/VAPA Subcommittee

Natasha Beery, BSEP Director

Last Tuesday, February 4, 2014, there was a meeting of the Music/VAPA Subcommittee. It was well attended and included members of staff as well as parents. The subcommittee discussed music as well as arts funding in general, including why dance, drama, visual arts were not funded at the schools as much as they had been in the past. One of the factors mentioned was space limitation. There was also a general discussion about the transfer of VAPA funds (to the General Fund) for teacher release time, and the affect of the dwindling fund balance on the VAPA program. The next meeting will be held on March 4, 2014.

Martin asked if there was any discussion on how to sustain the program. Beery stated that the Music/VAPA structure shifted during a time when the General Fund needed more support. At that time, BSEP began funding not only supplemental music teachers, but also the music teachers that supplied the release time for 4th and 5th grades. Also, because BSEP pays for release time in both CSR as well as VAPA, there is an unintentional overlap in funding coming from BSEP. That is an area of concern that will become an item for discussion.

Beery stated that McCulloch will be going to the Board in March to talk about the sustainability of the VAPA fund, and present various scenarios of what could be done within the constraints of the current funding structure and what could be done if there is a shift in the structure. Martin asked how the models would be formulated, and Beery responded by saying that she, McCulloch and Deputy Superintendent Cleveland would be working on that together.

Library and Technology subcommittees met jointly last Tuesday, February 4, 2014 and discussed specific areas of intersection, such as digital literacy and what is currently being done in elementary classrooms. There was an interest in reviving the development of a district-wide survey of the current use and future needs for instructional technology. Beery suggested that type of needs assessment would probably be best done in the broader context of BSEP Measure preparation. She will bring that topic to a preliminary BSEP Measure Planning Group, with P&O Co-Chairs Martin and Hensley, Board Directors Julie Sinai and

Josh Daniels, and Superintendent Evans , who will be meeting together to talk about the next steps in this process on February 19, 2014.

Beery noted that she will be going to the Board on Wednesday, February 12, 2014, to make a brief presentation of the BSEP Annual Report and the First Interim Report. It was presented a month ago as a consent item but was pulled for discussion. The Board of Directors asked Beery to comment on the trajectory for BSEP resources, focusing on areas of expenditure that might not be sustainable through the end of the measure unless changes are made, as well as which resources have stronger fund balances, and the reasons for that. She is currently incorporating the questions that she received from the Board Directors into her presentation.

Charity DaMarto, OFEE Supervisor, was asked by the Board to make a preliminary report on the Family Engagement Pilot Program, and Beery is assisting her with that as well as incorporating questions that came from Board members. This is the middle of the second year of the two-year OFEE pilot program, and there needs to be a proposal going forward as to how to continue it or what might replace it. This is one area of interest for possible LCFF funding. DaMarto put together three models for preliminary discussion: one that is sustainable in the BSEP context and two that are expansions that would require additional funding. The models are not actual proposals; if they were, they would come before the P&O committee first. As the District has been going to various community and district groups to talk about LCAP, one of the things that people have asked for is a parent liaison at every site. They are trying to put together a very simple cost estimate to inform this conversation.

Martin asked what programs were unsustainable besides VAPA. Beery stated that she is reviewing a spreadsheet which Liz Karam, BSEP Senior Analyst, put together and looking at which programs, at the current rate of expenditures, are deficit spending beyond projected revenues and carryover. The information does not account for salary increases and other shifts, but overall, CSR, VAPA, and School Site Discretionary are programs that have expenditure structures that are beyond projected revenues. Other programs have more flexibility in them, with stronger fund balances or other ways to construct their budgets.

8. LCAP Budget & Regulations

Javetta Cleveland, Deputy Superintendent

Cleveland provided the following handouts: • *BUSD Local Control and Accountability Plan: P&O Meeting February 11, 2014* (PowerPoint slide hardcopy), • *Proposition 98 Revenues (Graphs by School Year)*

Deputy Superintendent Cleveland began the presentation with background on Proposition 98 Revenues which fund California schools. The handout shows what the District's funding has been over time. The cuts in funding to all California school districts are shown from 2008-09 through 2011-12. The bar graph for 2013-14 shows the funding getting back to 2007-08 levels, restoring a lot of the revenue that was cut in the past. Many of the cuts and budget adjustments had been to areas such as Adult Education, central office costs, and office costs at some school sites. Funding is projected to increase over the next eight years.

Cleveland highlighted several areas in the PowerPoint for the P&O Committee. She stated that the state CSR funding threshold was increased from class sizes of 20:1 to 24:1. BUSD's state funding to support CSR was reduced from \$2.6M to \$1.9M because of the new class size target. The district is still getting the \$.7M difference, but it is now rolled into the Base Grant, and not specifically designated for CSR. The decision needs to be made on how we handle class size as a district. (slide *Class Size Reduction Funding*-page 2)

Cleveland enhanced the graphs in the slide *LCFF Funding Increase over 8 years* (page 3) by indicating the areas of funding in more detail. Under the Prior Formula in 2012-13, the district received \$66M from state funding sources. The new formula aims to provide equitable funding to all school districts. Every school district will get the same amount per student for its Base Grant funding, whereas each district got a different amount per student based on the old formula. All school districts will receive the same amounts, according to grade spans, with the exception of supplemental funding and concentration funding. The Supplemental Grant funding will be based on the population of Low Income (based on Free and Reduced Lunch eligibility), English Learners or Foster Youth. In looking at 2020-21, the formula is based on the Governor's budget and the amount per student, and then there is a gap between where district is now (2012-13: \$66M) and the target (of \$82M). The gap of \$16M will be funded over an 8-year period. In 2013-14, the Governor funded 11.78% of the \$16M gap for a small increase. In 2014-15, the Governor is projected to fund 28% of the gap, which gives another \$4M to the district, and it increases both the Supplemental and Base Grants. The goal is to get districts back to what they were getting in 2007-08 (including a COLA), at a minimum. In 2013-14, the Supplemental Grant calculation is \$.8M, the higher of the Supplemental Grant calculation or the district's EIA (Economic Impact Aid: <http://www.cde.ca.gov/sp/sw/t1/eia.asp>). BUSD's EIA was .8M/year, and the districts have to spend at least what is spent in EIA. Even though EIA is no longer a program or a grant coming into school districts, Berkeley will have \$.8 Supplemental Grant money that will be rolled into the plan. In 2014-15, the Supplemental grant money will increase from to \$2.4M. By 2020-21, the Supplemental Grant funding will be \$5.9M/year. In short, there has been a reduction in money specifically tied to CSR, even though the Base and Supplemental Grant money is increasing.

The slide *LCFF 2020-21 Target Calculation* (page 3) outlines the rates that are used to determine the target. The first line shows that every school district gets the same amounts for the Base Grant for those grade spans per student. The CSR is included for the amount per student for the K-3 calculation. The second line indicates the amount that every school district gets from the 20% of the Base to calculate the Supplemental Grant. The third line indicates that BUSD has 42% actual, unduplicated count of the targeted student populations (Free and Reduced Lunch, English Learners, and Foster Youth) and that percentage is used to calculate the supplemental funding of \$650 (42% of \$1,548). The fourth line shows the 2020-21 LCFF target amounts. Every year the target could change based on the Governor's budget and COLA. This target on the slide is based on the 2014-15 state budget. Every year the target will be recalculated based on each year's budget, and then a portion of the gap will be funded.

Every school district must develop a *Local Control and Accountability Plan-LCAP* (slide-page 4) that supports the targeted student groups specifically but is not limited to those students. The LCAP is a three-year plan and is due July 1, 2014. The state passed regulations related to the LCAP plan, which also included a template for a district-wide planning document. The plan must include the following items: Annual Goals and Progress Indicators, Actions, Services and Expenditures, Process used to Engage Stakeholders, and Focus on the Eight State Priority Areas along with the local priorities.

9. LCAP and BSEP: State Priorities and District Goals, Focus on Family Engagement and School Climate

Donald Evans, Superintendent and Natasha Beery, BSEP Director

Evans continued presenting the handout: • *BUSD Local Control and Accountability Plan: P&O Meeting February 11, 2014* (PowerPoint slide hardcopy)

Superintendent Evans reviewed *The State of California's Eight Priority Areas* (slide-page 4). He went on to present *Which Students are Monitored in the LCAP?* (slide-page 4). Evans stated that in this process the consideration should be: “what is essential for some, (the target groups), and good for all (students).” The targeted students are high-need students: Low Income Students, English Learners and Foster Youth. There are also “Numerically Significant Subgroups” which are groups of more than 30 students, such as African American, Asian, Filipino, or Hispanic or Latino, among others.

Superintendent Evans reviewed district data with the committee. He began with *Vision: All students will meet state academic targets* (slide-page 5). The slide presented the Academic Performance Index (API) for the district for all students taking the test (Grades 2-11) and for 2013 the index was 821, which showed an increase of 31 points from 2011. What is alarming about the data is that it shows a gap of almost 250 points between the African American/Hispanic/Latino students and White students. Even though there are increases for all groups, it was still not enough and he feels that there should be some urgency around this data. What does the district need to do to get scores up and improve the performance of students who have not been performing?

Vision: Every Child Will Read Proficiently (slide-page 6) shows the percentages of third graders that are reading at target in 2013 with 72% meeting the “proficient” level. Despite the overall increase in students meeting proficient levels, it is still low for African American and Hispanic/Latino students.

Vision: Every Child Will Be Safe, Responsible and Respectful (slide-page 6) shows the disproportionality in the percent of students suspended from school overall - 4% K-12 in 2013, while for African Americans, it was 10%. Even though that is a decrease from 16% in 2011, the district would like to see it down to 0%. What types of programs and supports do students need to get the number of suspensions to 0%?

Vision: Every English Learner Will Become Proficient in English (slide-page 7) Even though the percentages of students “making progress” in the district are better than what is happening state-wide, how do we get that to 100%? We need to look at more than 30-minutes of ELD a day (required) and what more does the district need to put in place to make sure more students are “proficient?”

Vision: Every Child Will Attend School Every Day (slide-page 7) indicates that in 2013, there were 20% of students 9-12 missing 10% or more of the school year. The data also shows that 35% of African American students and 24% of Hispanic/Latino student miss 10% or more of the school year. There is an overall decline in the percentages. How does the district help get the students to engage and attend every day?

Superintendent Evans asked the P&O committee members to consider programs, supports and resources that those students might need. What do the schools have that are best practices that are working that could be looked at and implemented district-wide that would make a difference in students' performance?

According to LCAP, the district will have to have a plan, consult with groups, review the plan, have public input, and adopt a plan by June 2014 (slide-*Adopting and Updating the LCAP*, page 8). Evans stated this was an opportunity to be transparent about the work. The district has had the opportunity to meet with the PAC, ELAC, Superintendent's Budget Advisory Committee, BSEP, EAC, SGCs, and students as well. The district trained facilitators to work with community organizations and to get feedback from them on what

the district needs to do to move students forward (slide-*Consultation Groups*, page 8). BUSD plans to have the all the site plans align to the priorities.

Superintendent Evans then asked the members of the P&O Committee to participate in an exercise to get input on School Climate and Parent/Family Engagement. Each member was given colored dots to attach to posters set up on either side of the room. The items on each poster included input from previous groups. The members spent a few minutes attaching their dots on what they would consider “high leverage” programs and note what the district should focus on. If the participants wished to add something they think the district should provide to students, they could write it in. After the exercise, Evans noted that under School Climate, the top three items were Counseling and Mental Health Services, Botany (Gardening)/Nutrition, and Literacy and Math coaches. The top three items under Parent/Family Engagement were Parent Liaison at each site, more funding for translations, and involve parents that have been traditionally less involved. The information will be incorporated and suggested program and activities developed. Superintendent Evans will return to the P&O Committee on March 11, 2014, with more information and have the committee members be involved in developing other elements of the priorities.

Fredericks asked about the statistics around the achievement gap relative to other districts in the state, specifically what targets does the district have, what is progress? Evans replied that not only the state, but the country, is dealing with the achievement gap, especially with African American students. He noted a recent visit to Culver City, a district that has a small achievement gap (approximately 20-30 points), to see what they were doing with their students of color. They had high expectations for all students and how they engage students in the classrooms. They expect every student to be in a club and for students who were targeted as having problems, a counselor had 25 of them for 10 months, and each teacher commented on that student via email every day. There was a 20-30 point difference, but all the students were at 800 level. Fredrick asked how the district would know if it was allocating the appropriate amount of the budget to addressing that gap? Evans replied that what is being done now is not closing the gap as much as the district would like. He noted that the district needs to look at which programs are working, because if a program is not working to close the gap, should it be discontinued? What will the district do with the money that it will be given for those targeted groups that will make a difference in achievement? That will require the district to look at what it is already doing and whether it is working. That requires the district to have conversations with the Educational Advisory Committee.

Mahmood asked, in terms of the achievement gap, especially with the African American students in Berkeley, are we assuming most of those students are addressed under free and reduced lunch? Smuts stated that trends show that the gap is smaller in younger grades and increases significantly in upper grades. In one statistic, if parent educational achievement and income held the same, you would still see African American students performing at a lower level than their counterparts, and so it is not tied only to income. A lot of people assume that the district-wide achievement gap stems from income but it is clearly something more than that.

Bartlow mentioned that students that become disengaged from education are fodder for the criminal justice system and efforts made on this front would do a lot more for the individual than putting them in the penal system on the back end. Evans noted that at BUSD, it is a top priority for everyone; we know we have to do something and what is that something? What are those high leverage programs/resources/supports that will give us the biggest bang for our buck? Lazio said that BSEP school site funds are actually addressing

some of these efforts now, and BHS has been funding intervention services, ELL home school liaisons and other small programs. She noted that there was a lot written about them and there was data for them.

Evans stated that the EAC - Education Advisory Committee - was examining programs at all schools sites and data about particular populations in determining whether specific programs were good and why. Hamill asked where the gap originates and accelerates or whether it was a steady increase? Evans stated it depended on what research was looked at; some say third grade, some say second grade, was the time when schools started losing African American boys. More were lost after middle school and by the time they were in high school, they can't check out because of the law, but they are "checked out." Evans stated that he could get more information for the committee, but the district was losing kids in numbers. He stated that he liked the LCAP process because the district really has to hone in to what they are doing for the targeted populations. Glimme added that what you cannot see in the data from internal assessments is that there is a narrowing of the gap over the school year and then it widens over the course of the summer. When you look at the end of year gap vs. start of next year there is a really big difference between different subgroups. Higher achieving subgroups are stable or go up in proficiency over the summer, while high risk students tend to go down over the summer. That may be a high leverage place to start. Evans stated that people have mentioned extending the year as well as extending the school day. Lamar reminded the group that there was a history in Berkeley of African American Studies departments and a living history that is not recorded in the data per se and that needs to be acknowledged and those resources tapped into.

10. Class Size Reduction Discussion

Co-chair Martin opened the discussion about CSR funding from the state by stating that the P&O Committee has a responsibility as stewards of the Measure to revisit CSR funding because it represented a change specific to the K-3 class size terminology in Measure A-BSEP. Hensley took the lead for the discussion as to what the P&O Committee was responsible to on the Measure as far as the considerations were of potentially moving from 20:1 K-3 to 24:1. Hensley stated that the District and Board could be looking to the P&O Committee to make a recommendation about CSR. She asked: What happens to 20:1 under the new state funding structure? Hensley wanted input on the pros and cons of moving toward 24:1 across the board, and to figure out what questions the P&O Committee might need answered before it could make a recommendation to the Board. Beery stated that the CSR budget would be going before the Board in March. Hensley pointed out the wording in the Measure: "*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.*" (Measure A, 3. Definition of Purposes, A. Smaller Class Sizes, Expanded Course Offerings, and School Counseling Services, ii.) The P&O Committee has to ascertain whether funding has changed such that class size reduction is not funded at the same level by the State, in which case the question arises of whether 20:1 must continue. The designated CSR funds were reduced by \$.7M but that amount went into the Base Grant. Hensley asked the committee members if they had questions or concerns.

Frederick asked if, according to the spirit of the measure, the P&O Committee would be violating the trust of the voters if it were to recommend raising it from 20:1. Glimme thought it was clear that the way the Measure was intended, if the money from the State was not specifically designated for K-3 CSR, the "as long as" clause is triggered. Nevertheless, with a new measure on the horizon, it might be a bad time to talk about raising class sizes.

Gordon thought it was up to the School Board to determine whether to keep 20:1. The District has the money; it just wasn't designated for class size. Hensley stated that the Measure does not require BSEP to continue funding at 20:1, but does the committee have a responsibility to consider whether it should? Smut said that he felt the goal was clearly stated as 20:1 and referred to the sentence: "*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...*" (Measure A, 3. Definition of Purposes, A. Smaller Class Sizes, Expanded Course Offerings, and School Counseling Services, ii.) Hensley said that the Measure does carve out that the class size is 26:1, with 20:1 as a special circumstance.

Hensley asked whether it was BSEP and the CSR funds responsibility to address the \$.7M gap? Armstrong asked if there was data to show that a 20:1 ratio helps student outcomes in K-3? And if so, then it could be argued that it could be one of the strategies used to help serve those subgroups. Others agreed that the data was a mixed bag and there was acknowledgment that it was an important question that could not be answered in this meeting. Armstrong asked if there could be a different sharing ratio between the General Fund and BSEP to get to 20:1? Hensley responded that parts of the CSR budget were going to things other than reduction of class size, such as middle school counseling, expanded course offerings and programs. Paxson was interested in what the teachers and principals wanted, whether 20:1 was a key number, and whether jumping to 24:1 right off the bat could be a big leap. Perez wanted to know who would be making the decision, and the response was that the Board would decide. Hensley stated that the District Staff generally makes the proposal for the budget. Deputy Superintendent Cleveland stated that for the current 2013-14 school year the District was supporting CSR by using the \$.7M Base Grant funding for class size reduction. No decision has been made for the 2014-15 school year.

Glimme stated that the P&O Committee was not a decision-making body. It does not control the money but only provides planning input and oversight. The School Board controls how the money is used, based upon proposals from the administrative staff. The District makes decisions every year with respect to CSR and the program support money. Hensley stated that the P&O Committee's role includes pre-input on how it believes the budget should be structured. For example, is it appropriate for BSEP to pick up more of what it will take to get class size to 20:1 this year, and then other things in the CSR budget will have to be cut. Right now the committee is focusing on what the Measure allows, what it suggests or guides as appropriate, and it clearly indicates 20:1 is not a requirement. However, if the district wants to make sure that 20:1 continues, is it appropriate for BSEP to be the one that is footing that bill? If not, does that then put class size at risk of changing? Glimme thought it meant that the committee could go to the Board and state what they believe is appropriate, and Hensley added that the P&O makes recommendations but we don't get to decide.

Hamill reminded the committee that the class size number is just an average and recalled that when the budget was shrinking, the then-superintendent asked BSEP for money because the District was losing money in the GF and wanted to keep those programs. He felt that it was ironic that 3 years ago the discussion was about the appropriate use of funds and to carve RtI² and middle school counselors out of the BSEP CSR budget. Now we have turned it around and that since money was supposedly coming back into the GF, he felt that the GF should pick up more of the program support that in the lean years was shifted over onto BSEP. Hensley pointed out that middle school counseling was called out specifically in the CSR budget as a specific expenditure. Fredrick stated that as he read the measure about deciding what to fund, it specified CSR first and middle school counselors are in there, but

fund CSR first, then if there is money left over, fund other things. The only worry he had was for setting precedent. He felt that as long as it could be projected to meet the numerical CSR targets and the other things that are mentioned specifically, he thinks BSEP has an obligation to attempt to do that. What he does not want to do is, if it is projected that we will not meet those class size reductions over the course of the remainder of the Measure, because of population growth, COLAs, reallocations in the GF, we should have that discussion now and not set a precedent that BSEP takes all of that on. Hensley asked what were the key questions that people would want to have answered before they could take action on a proposal from the District about the CSR budget?

Beery confirmed that 24:1 was the bar that allowed the district to qualify for CSR funding, which is a separate question from what the Measure states, which was that you begin with 26:1 and then bring it down further, so long as funds are available, to 20:1. This was already a class size reduction from 34:1, which is what the GF provides. Smuts stated that it was his understanding that under the new CSR rules, if any school site exceeds the 24:1 average, the money would be lost for the entire district.

Lamar asked about the last statement “*Alternative methods to reduce class sizes in a particular year may be adopted by the School Governance Council and implemented as approved by the Board of Education.*” (Measure A, 3. Definition of Purposes, A. Smaller Class Sizes, Expanded Course Offerings, and School Counseling Services, ii.) Glimme stated that he thought that phrase was primarily about places in the middle schools and the high school where class sizes are reduced in various ways, for instance providing for very small math classes by offsetting that with other larger classes.

Paxson wondered about whether there were numbers for what the GF funds for the ratio and how BSEP buys it down. Maybe the committee needs to see that again so that it is really clear that BSEP is still buying down quite a bit, from 34:1. As a clarification, are we recommending BSEP pick it up or are we recommending that we go to the GF and for what time frame? Hensley stated that for 2013-14 it was already determined, the GF is picking up CSR. Hensley did not think we had to say what we have to do for the remainder of the Measure, but there are not a lot of years left and what happens next year sets a precedent. Beery noted that recommendations would be for three school years through 2016-17. Mahmood asked if the committee was talking about making a recommendation for just one year? Martin stated that the P&O committee should not be making a recommendation, but that a statement could be made as to how the committee feels as stewards of the Measure, relative to the words in the Measure and the changes in funding. Mahmood added that in order to be responsible stewards of the Measure, we would need to know the exact cost. A statement to the School Board would have to be based on fidelity to the Measure, as well as some actual numbers on what it would cost and what the potential detriment could be to the existing services. What would it look like if the District continued to fund this vs. what would it look like if BSEP funded this and these are where the cuts would be and this would be what the implications would be. Lazio stated that she felt that the Committee needed more information before making a statement.

Martin said that the money was there and that the question is whether the Measure requires/asks/intends us to fund K-3 at 20:1, and that we think for reasons relative to renewing the Measure in 3 years, we feel that it is important maintain K-3 at 20:1. Glimme stated that he thought the statement could have two parts; in what we feel is a plain reading of the Measure, 1) what can be done and 2) what should be done. He felt that CSR funds have decreased and that activates that clause, CSR can be changed, but we think for the reasons stated class sizes should probably be kept at 20:1. Smuts stated that if the same

people that make the decisions on how to spend the general fund make the decisions to spend BSEP money, isn't the overriding principle to convey that keeping class sizes small in K-3 could be important. And if for budgetary reasons, money needs to be freed up for that \$.7M, give it to one class; make the transition start at grade 3, with six classrooms. The idea was widely stated that what the general public knows about the Measure and identifies with universally is class size reduction. To raise the class size on the verge of renewing the Measure seems problematic.

Hensley said that the committee had not touched on the things that would potentially be cut as a result. It is a reality that people need to take into account that the budget that comes to us may suggest there will be cuts to expanded course offerings, middle school counseling, RtI². Martin stated that the committee did not have time to put together a statement for the next evening's School Board meeting. It could try to prepare one for the next meeting for the Committee to review and to hopefully enforce a budget that represents the desire. Lamar asked if the costs could be split.

Martin suggested a statement: *We, as a committee, feel that it is important to maintain 20:1 as per the Measure for reasons relative to renewing the Measure in three years and relative to what we feel is important given the priorities in the Measure.*

Smuts mentioned that student outcomes are really important, so what the committee was doing was providing an interpretation of the public's desire and he was trying to get a sense of what the committee's purview was. Martin responded that many aspects of the Measure could be argued and have been over the years, and the committee's charge was to look at what the voters intended, look at student outcomes, assess what the administration recommends and act with all those things in mind.

Cleveland stated that very few districts have class sizes at 20:1, and in fact most of the other school districts have increased class sizes to well above 24:1 and for them to qualify for state class size reduction funding they have to show progress toward getting to 24:1 in the next eight years. Cleveland also confirmed that under the new rules, each school site must meet 24:1 and they cannot exceed that or the funding is lost for the entire district. Previously it was averaged district-wide per grade level. Hamill reiterated that during the lean years for the General Fund, increased program support came out of BSEP and now that the CSR was coming under pressure because the District lost \$.7M out of that, shouldn't the GF shift it back? Hensley responded that the way CSR got calculated shifted over the last couple of Measures. There is also more than \$.7M a year that goes beyond just CSR and the committee will have to take a look at that and send a message about what it thinks is important. Lazio said that she charted the value of the leftover funds after allowing for teachers salaries. In 2008 or 2009 it was around \$1M, and more recently, it has been close to \$3M range for the ECO and program support monies.

11. Adjournment

The meeting was adjourned by acclamation at 9:31 p.m.

Minutes submitted by Linda Race, BSEP Staff Support

BSEP Resources
First Interim Summary FY 2013/14

	0000	CSR 0841	Site Disc 0852	VAPA 0853	Public Info 0854	Prof Dev 0855	Evaluation 0856	Parent Outreach 0857	Library 0860	Tech- nology 0862
Revenue	433,800	15,867,723	2,464,305	1,502,626	490,653	778,960	605,859	300,525	1,743,046	778,960
Contributions to GF	0	(12,305,200)	0	(418,125)	0	0	0	0	0	0
Net Revenue	433,800	3,562,523	2,464,305	1,084,501	490,653	778,960	605,859	300,525	1,743,046	778,960
Expenditures	473,800	4,157,340	2,974,350	1,267,622	560,878	959,716	657,094	419,022	1,912,823	772,967
Excess (Deficiency) of Revenues Over Expenditures	(40,000)	(594,817)	(510,045)	(183,121)	(70,225)	(180,756)	(51,235)	(118,497)	(169,777)	5,993
Beginning Fund Balance	918,432	901,809	610,110	272,256	338,208	191,625	78,843	318,463	519,590	38,070
Increase/Decrease in Fund Balance	(40,000)	(594,817)	(510,045)	(183,121)	(70,225)	(180,756)	(51,235)	(118,497)	(169,777)	5,993
Ending Fund Balance	878,432	306,992	100,065	89,135	267,983	10,869	27,608	199,966	349,813	44,063

2012 Growth API		Demographics of Students Tested						Academic Performance Index - Growth 2012					
Unified SD	County	Total	% AA	% SED	% Latino	% White	API All	API AA	API Latino	API White	API SED	AA / Wht GAP	Lat / Wht Gap
BUSD	Alameda	6,377	24	41	23	30	810	658	759	922	728	264	163
Natomas	Sacramento	8,682	24	43	28	20	785	710	741	853	733	143	112
Antioch	Contra Costa	13,726	23	52	35	24	742	673	731	791	704	118	60
Fair-Suisun	Solano	16,168	22	48	33	24	784	715	744	847	732	132	103
Culver City	Los Angeles	5,025	19	38	40	24	855	822	812	906	807	84	94
Sacto City	Sacramento	32,178	16	61	35	18	768	690	730	840	738	150	110
Twin Rivers	Sacramento	18,131	16	82	37	28	726	664	711	767	715	103	56
Elk Grove	Sacramento	45,116	16	53	25	24	807	711	763	857	755	146	94
San Leandro	Alameda	6,337	16	56	43	12	743	673	703	793	710	120	90
Long Beach	Los Angeles	62,575	16	68	52	18	781	725	750	882	746	157	132
<i>average</i>			19	54	35	22	780	704	744	846	737	142	101
San Bernadino	San Berno	35,720	15	85	70	10	726	688	723	789	725	101	66
Oakland	Alameda	26,483	33	64	36	7	730	655	701	900	692	245	199
Vallejo City	Solano	10,030	31	58	31	10	725	646	706	773	692	127	67
Val Verde	Riverside	13,856	17	76	69	8	801	774	796	849	763	75	53
Rialto	San Berno.	19,069	15	45	76	5	750	717	751	797	742	80	46
Moreno	Riverside	25,106	19	77	63	11	742	697	736	799	726	102	63
Compton	Los Angeles	18,653	21	79	77	0	697	668	703	693	699	25	-10
Pittsburg	Contra Costa	6,829	23	67	56	7	737	698	728	779	728	81	51
WCCUSD	Contra Costa	20,408	22	66	48	11	715	644	685	813	683	169	272
<i>average</i>			20	61	46	16	760	697	736	825	728	128	96

BERKELEY UNIFIED SCHOOL DISTRICT

TO: Donald Evans, Superintendent
FROM: Charity DaMarto, Supervisor of Family Equity and Engagement
Natasha Beery, Director of BSEP and Community Relations
DATE: February 12, 2014
SUBJECT: Report on Office of Family Engagement and Equity

BACKGROUND INFORMATION

In April 2012, the Board of Education approved a new model for providing Family Outreach and Parent Educational Services, to begin in FY 2012-13. This created the new Office of Family Engagement and Equity. The primary goals of the office are the following:

- 1. Create a welcoming school environment for ALL families.*
- 2. Provide support to families of students in need of academic, behavioral, and emotional support.*
- 3. Increase the involvement of marginalized and under-represented families (African-American, Latino, and other families who are not proficient in English).*

PROGRAM SUMMARY

A two-year pilot program was designed to focus on engaging families by strengthening the connection between the home and school. District staff created a Family Engagement and Equity pilot program based on research on effective family engagement models, together with 2020 Vision community discussions, the results of the District Communications Study, and surveys to families. The Office of Family Engagement and Equity (OFEE) leads efforts in two distinct but related areas, family engagement and equity, throughout Berkeley Unified School District.

Six elementary schools were selected to participate in the pilot years of the new program: Emerson, John Muir, Berkeley Arts Magnet, Malcolm X, LeConte and Thousand Oaks. A Site Coordinator position was created to support families at the six school sites. Four criteria were considered in selecting the pilot sites:

1. Number of students enrolled in the Free and Reduced Lunch Program,
2. Number of English Learners,
3. Number of students with “below basic” achievement in math and/or English, and
4. Schools’ Program Improvement status.

In September of 2012, a Supervisor of Family Equity and Engagement was hired, and two of three Site Coordinators were hired in early fall of 2012. A bilingual Site Coordinator was hired in February of 2013. The program has been fully staffed for just a year, but in that brief time, there are a number of accomplishments and lessons learned that could inform decision-making for future parent outreach plans.

ACCOMPLISHMENTS FROM THE PILOT PROGRAM

Goal 1: Creating a welcoming school environment for ALL families

Site staff worked to improve parent engagement, school climate, and site communication. The District Family Engagement Supervisor and Site Coordinators varied their strategies, based on the areas of specific need at each school site.

Accomplishments included:

- Improved attendance of under-represented families at site-based workshops, committee meetings, and volunteering opportunities, through increased personal connections and outreach, alongside mail invitations.

For example:

- Partnering with site teacher leaders and principals to design four well-attended Math/Common Core workshops for parents,
- Increasing parent participation at two schools with already high rates by focusing on communication through bulletin board postings and cross communication between multiple committees on site;
- Parents reported to Site Coordinators that they feel an increased sense of comfort coming to school sites to ask for support and resources;
- Site Coordinators consulted with sites to increase visibility of images, schoolwork and resources in order to reflect the racial/ethnic diversity of the student body at school sites.

Goal 2: Provide support to families of students in need of academic, behavioral, and emotional support.

Site staff established an ombudsman program at all six sites, resulting in improved services to families, including preparation for SST, IEP and other meetings.

- Each Site Coordinator contacted 10 target families weekly.
- Site Coordinators provided parents with support before and after SST, IEP and 504 plans were discussed and developed. Parents have indicated they felt more informed and prepared to participate in the meetings.
- Site Coordinators also participated in RTI, SST, IEP meetings to build partnerships between teachers and parents in support of the students.

Goal 3: Increase the involvement of marginalized and under-represented families (African-American, Latino, and families who are not proficient in English).

- The OFEE was instrumental in providing support for two sites in re-establishing ELAC representation for their schools.
- DELAC attendance has greatly improved, with the number of sites with representatives increasing from two to fifteen.
- Through direct outreach and recruitment to parents and families, the OFEE has increased the representation of parents of color on SGC, PTA and ELAC leadership committees.

Additional Services to Schools Outside of the Pilot Program

In addition to conducting the pilot program, OFEE provided services to BUSD's three middle schools, and to the two elementary schools that do not have district or site-funded parent liaisons/site coordinators. Services included:

- Technical and facilitation support to elementary school ELAC's;
- A District ELAC/ DELAC resource guide for all school sites;
- Collaboration with Oxford Elementary School on a Math/ Common Core parent workshop;
- A series of parent workshops (Positive Behavior, ATOD, and Navigating Friendships) for all middle schools;
- Funds dedicated to pay teacher hourly for additional outreach to targeted families (home visits, conferences, and phone calls).

CHALLENGES AND LESSONS LEARNED FROM THE PILOT PROGRAM

- Building infrastructure and relationships was challenging due to the necessity of splitting time between two school sites;
- There was a significant delay in finding and hiring a bilingual site coordinator;
- The lack of an eligibility list for long-term Site Coordinator substitutes left sites without staffing for significant periods;
- There is limited site space available for meeting with families; and
- There is a lack of dedicated district space to meet with families/parents.
- There were repeated requests and questions from schools without Site Coordinators, or those paying for equivalent services through other funds, as to whether and when services would be available for each site.

INITIAL RECOMMENDATIONS FOR 2014-15 AND BEYOND

At this point, the current model is not being recommended for continuance after the pilot period. Continuing the current pilot program as it is structured requires substantial deficit spending of the BSEP fund balance, beyond the amount projected for the remaining three years of the current measure. Furthermore, the pilot model only serves six sites, and there has been a strong interest in a program that would serve more sites. However, BSEP funding is not sufficient to provide an increased level of staffing. An expansion of the program would require additional funding sources, such as the LCFF base and/or supplemental grants. An alternative that could be funded through BSEP funds alone would be to provide scaled-back support on a zone-based model rather than through site-based coordinators.

A formal proposal or set of proposals will be brought to the BSEP P&O Committee and to the Board in the late spring, once LCAP and BSEP planning and Board discussions provide clearer direction. In the meantime, three possible models are being proposed to open an initial discussion. A budget summary is appended after the description of the three models.

MODEL 1:**Cost estimate: \$832,139*****Site Coordinator for all K-5 Schools, MS Coordinator, HS Site Coordinators***

This first model is the most comprehensive. Site Coordinators could be established at every K-5 site, from 0.4 FTE to 1.0 FTE, with staffing levels to be determined by school size and student demographics (low-income, free/reduced lunch, English Learners, students scoring “below basic”). One Middle School Coordinator would work with all three middle schools. At the high schools, 1.5 FTE would be provided to Berkeley High and 0.5 FTE to Berkeley Technology Academy. The Supervisor of Family Equity and Engagement would continue to oversee the program.

Under Model 1, support for Family Engagement and Equity would be provided at the School, Family, District and Community levels with the following areas of focus:

SCHOOL LEVEL SUPPORT

- Academic support for students (attend RTI, IEP’s, SST meetings)
- Behavior support for students (attend IEP’s, SST meetings)
- Attendance/health monitoring and support for students (preventative outreach, SART support/ SARB attendance)
- ELAC support at every site
- PCAD support at every site

FAMILY LEVEL SUPPORT

- Ombudsman/advocacy services
- Parent Education workshops (PowerSchool, school committees, understanding report cards, Common Core, homework strategies, effective parent/teacher conferences, how to navigate BUSD, CELDT)
- Parenting classes (nutrition, effective discipline and encouragement, mental health, local resources)
- Clearinghouse of community resources and services

DISTRICT LEVEL SUPPORT

- DELAC planning and facilitation
- PAC support
- 2020 Vision Design Team participation
- Professional development for staff
- SARB support (home visits, committee participation)

COMMUNITY LEVEL SUPPORT

- Charitable distributions
 - School supplies
 - Food
 - Clothing
- Health fairs
- Summer resource fair

MODEL 2:**Cost Estimate: \$645,864*****Site Coordinators K-5***

Given the expense of Model 1, another option to consider could be a phase-in of a Site Coordinator program over a few years, beginning with K-5 support, and expanding to middle schools and high school as more state funding becomes available. Under this model, a Site Coordinator would be provided at every elementary site, with FTE determined by school size and demographics as in the first model. The .27 FTE support for Berkeley High would be continued, but not expanded immediately. All supports at the school, family, district and community levels would be provided as under Model 1, but only at elementary schools. It should be noted that both Model 1 and Model 2 would require dedicated space for site coordinators at each school site, which could be problematic given current space constraints.

MODEL 3:**Cost Estimate: \$350,598*****Zone Coordinators K-8***

An alternative that remains within BSEP funding levels could be a zone-based model, providing three Zone Coordinators to support K-8 schools. OFEE staff would work with schools by zone to develop a family engagement plan for each site. District-wide, community and family-level support in Model 1 would still be provided, but the school-site support would not be part of this model. All services would be provided from a central location.

A District Welcoming Center with public health representatives, computer lab, space for parent workshops/ classes would be a welcome adjunct to Model 3 or any other model, but is not feasible with BSEP funding alone.

EVALUATION AND ACCOUNTABILITY MEASURES

The Family Engagement and Equity model selected will require several performance indicators to evaluate the effectiveness of services on an on-going basis, and to help direct resources to the priority areas. The OFEE would be evaluated by measurable outcomes such as those outlined below:

- SGC Surveys on School Climate, Student Engagement and Parent Engagement;
- Parent Focus Groups;
- Principal and Staff Survey;
- Successful outreach to families from high-need populations such as those with students who are Far Below Basic and Below Basic.
- Decrease in Chronic Absenteeism.

NEXT STEPS

The LCAP process and the BSEP planning process will provide opportunities to consider potential programs and budgets for 2014-15. Evaluation data such as that provided from the SGC surveys will also inform the process. Specific proposals,

along with budgets, will be brought to district committees and to the Board in May and June.

DISTRICT GOAL

III. Family/Community Engagement: Establish partnerships with our families and community to increase academic success for all students.

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) Section 3.B.ii.c.

FISCAL IMPACT

None at this time. This report precedes an eventual proposal to the Board. Current estimates for a later proposal range from \$350,598 to \$832,139.

RECOMMENDATION:

Receive this Office of Family Engagement and Equity Report.

BERKELEY UNIFIED SCHOOL DISTRICT

TO: BSEP Planning & Oversight Committee
FROM: Neil Smith, Assistant Superintendent for Educational Services
DATE: February 25, 2014
SUBJECT: Recommendation for Allocation of BSEP Class Size Reduction Funds in FY 2014-15

Class Size Reduction Staffing in the 2014-15 School Year

This recommendation is based on the following assumptions:

- Staffing enrollment of K-12 students is projected at 9,408, an increase of 338 students over the prior year's projection.
- Total average compensation (includes salary and employer paid fringe benefits) of classroom teachers is projected at \$89,100, an increase of \$3,000 per FTE over the prior year.
- BSEP revenue for the CSR fund in FY 2014-2015 is projected at \$16,023,555 with a net allocation, after 7.22% indirect costs, of **\$14,944,558**.
- General Fund revenue is projected based on the Governor's budget of January 2014.

The average class sizes are being maintained with teacher/student staffing ratios of:

- 20:1 for the K-3 grades,
- 26:1 for 4th & 5th grades,
- 28:1 for grades 6 thru 12.

The class size reduction is achieved with General Fund monies being used to establish a ratio of 34:1 for the K-5 grades and 36:1 in grades 6-12, and BSEP CSR funds used to reduce the pupil-teacher ratios to the lower class sizes.

According to the BSEP measure, 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. Under the new Local Control Funding Formula, funding for the K-3 Class Size Reduction Program has changed; the CSR target is now 1:24, with funding allocated to that purpose at \$1.9 million for BUSD, rather than the \$2.6 million previously awarded for the 20:1 ratio. However, the difference of \$700,000 is provided to the District in its base funding, and may be used to continue class size reduction at a lower than 1:24 level. For this year, the funding will be used for that purpose.

The staffing formula used for secondary schools in FY 2014-15 is that defined in the BSEP Measure, section 6.B: student enrollment x 6 class periods per day/per student, divided by 5 teaching periods, divided by average class size

objective of 28:1.

This calculation results in a total of **442.84** Full Time Equivalent (FTE) classroom teachers projected to be necessary to staff the K-12 classrooms at the ratios listed above, of which BSEP would fund **135.66** FTE teachers (including the associated preparation time for BSEP funded teachers), an increase of **4.69 FTE** funded by BSEP over the previous year's plan.

To meet these targeted class size reduction goals, the expense to the BSEP Class Size Reduction fund in 2014-15 is projected to be **\$12,706,900**, an increase of \$831,800 over the 2013-14. This figure includes the FTE compensation, substitute compensation, and "direct support," which are the operational and other costs associated with opening and maintaining additional classrooms. The attached "Teacher Template" details this recommendation. (Attachment A)

It should be noted that enrollment projections are reviewed both prior to presentation of the budget to the Board for adoption in June, and again in early September after the actual enrollment has stabilized. The actual expense for the BSEP transfer to the General Fund for classroom teachers is calculated at the close of the Fiscal Year.

Discretionary Expenditures: Expanded Course Offerings, Counseling Services and Program Support

After the class size goals are achieved, the BSEP Measure stipulates that BSEP CSR funds may be used for "expanded course offerings (ECO)," counseling services at each of the District's middle schools, and "program support."

The District must be able to maintain the class size reduction goals stipulated in the Measure through the duration of the Measure, which is set to expire at the end of FY 2017. An important consideration in proposing expenditure of the BSEP CSR fund for these discretionary purposes is the need to maintain an appropriate reserve in the CSR fund, with the reserve for personnel variance an important consideration, given the cost of funding positions. For 2013-14, each 1% salary increases incurs a cost of \$154,483 to the CSR fund, and for 2014-15, the added cost would be \$157,959 for each 1% increase.

The increased cost of the teacher transfer and the need to maintain appropriate reserves means that amount of funding remaining for discretionary expenditures is smaller than in previous years. For 2014-15, it is recommended to continue the expenditures for expanded course offerings and middle school counseling, in keeping with the priorities of the BSEP measure and the needs of students. The expanded course offerings offer a wide variety of options for students, from AP augmentation classes, which give access to AP coursework for students who might not otherwise have such access, to science labs, yearbook and music classes. Middle school counseling provides social-

emotional and academic support to our students at a crucial point in their development.

In the area of Program Support, it is recommended to continue funding 3.3 FTE for elementary literacy coaches and 1.8 FTE teachers for 3/4 and 4/5 combination classes at the TWI schools. However, in order to maintain the CSR resource through the life of the measure, it is necessary to make some reductions to program support funding. In the past, BSEP funding has reduced class sizes in Math 7, algebra and geometry, but this will be discontinued for 2014-15, a necessary savings of 5.4 FTE for the CSR fund.

The BSEP-funded RtI2 program continues to function as a comprehensive way of tailoring education to meet all students' needs, using data to make decisions about student learning. In the prior academic year, the cost of 5.5 FTE of the 11 FTE originally proposed for BSEP funding were shifted to the General Fund for Special Education. For 2014-15, it is proposed to maintain the split of funding 5.5 FTE through BSEP and 5.5 FTE through the General Fund.

Following is the summarized recommendation for the expenditure of BSEP CSR funds for Counseling Services, ECO classes and Program Support in FY 2014-15.

Counseling Services at each Middle School

- **4.8 FTE counselors** at the middle schools, that is, 1.2 FTE at Longfellow, 1.2 FTE at Willard, and 2.4 at King. This is the same allocation as in FY 2013-14.

Projected expense: \$443,100

Expanded Course Offerings (ECO)

- **6.4 FTE classroom teachers** for ECO classes at Berkeley High School
- **1.6 FTE classroom teachers** for ECO classes at the Middle Schools

Projected expense: \$749,360

Program Support

Our recommendation is to fund **10.6 FTE** Program Support teachers in the next school year as follows:

- **3.3 FTE elementary school Literacy Coaches/Teachers;** (.3 FTE for each elementary school).
- **1.8 FTE elementary school teachers** for a .5 FTE allocation (plus .10 FTE prep time for each teacher) to each of three schools: Cragmont, LeConte and Rosa Parks to provide grade-specific time for students in 3/4 or 4/5 combination classes.
- **2.75 FTE RTI² teachers** for the 11 elementary schools (.25 FTE at each elementary school).

- **2.75 FTE RTI² teachers** for the three middle schools (.75 FTE for Longfellow, .75 FTE for Willard, and 1.25 FTE at King)

Projected expense: \$962,600

In summary, the recommendation for the expenditure of the BSEP Class Size Reduction monies in FY 2014-15 is:

Transfer from BSEP to General Funds for CSR: \$12,706,900

Discretionary: \$2,155,060

Indirect Costs: 1,073,034

Total Projected BSEP/Measure A Expense: \$15,934,994



BSEP Resource Key Issues

CLASS SIZE REDUCTION

- Deficit spending is **not sustainable** at current rate of expenditure
- After class size goals are met, funds are allocated for Middle School Counseling, Expanded Course Offerings at Secondary Schools, and Program Support
- In Program Support, BSEP has carried **some Rtl staffing**; for 2012-13 part of the expense was transferred back to the General Fund to provide Maintenance of Effort expense for Special Education, which has had reduced expenditures
- **State K-3 Class Size Reduction funds have shifted** from 1:20 to 1:24, reducing the CSR reward to BUSD by \$700K

MUSIC/VAPA FUND: *TO BE DISCUSSED MARCH 26*

- Affected by **enrollment increases at 4th/5th grade**: 18% increase over past three years
- Transfer to General Fund for **Release Time Music Teachers** was intended as temporary, cost is now over \$460K/year
- Supplemental Music Teachers provide equitable access to diverse options and smaller class sizes
- Enrollment in **Middle School** music is mushrooming
- BSEP is paying for Release Time in 4th/5th grade through both CSR and VAPA; overlap is about 1.5 FTE/year

PARENT OUTREACH AND PUBLIC INFORMATION:

- Higher fund balances due to shifts in structure and staffing
- Current fully staffed programs will expend the fund balance

SCHOOL SITE FUNDS

- Planned deficit spending due to posting carryover
- Carryover is sometimes due to unfilled PT positions
- Future **allocations will have to be lower** due to decreased fund balance
- Affected by enrollment ups and down; **Berkeley High School** has been getting a lower allocation, making funding tighter
- **School Site Plan decisions** and LCAP decisions inter-relate

LIBRARY, PROF. DEVELOPMENT, EVALUATION, TECHNOLOGY

Current levels of spending may be sustainable

- Library has increased FTE at larger sites
- Professional Development has multiple funding sources
- Program Evaluation also has multi-funding
- Technology budget is not deficit spending
- There is allocation flexibility among the latter three resources

BERKELEY UNIFIED SCHOOL DISTRICT
 CLASS SIZE REDUCTION FTE PLANNING DOCUMENT
 FY 2014-15 Proposal v 2014-02-25

GRADE LEVEL	STAFFING ENROLLMENT BY GRADE	GENERAL FUND * CLASS SIZE FTE	Meas. A CSR FTE	Meas. A Necessary FTE	Meas. A CSR FTE
ELEMENTARY SCHOOL					
TK and Kindergarten	788	34 :1 23.18	20 :1 16.22	0.60	
Grade 1	755	22.21	15.54		
- Release Time		0.89	0.62		
Grade 2	741	21.79	15.26		
- Release Time		0.87	0.61		
Grade 3	730	21.47	15.03		
- Release Time		0.86	0.60		
1-3 Adjustments				-1.35	
		34 :1	26 :1		
Grade 4	664	19.53	6.01		
- Release Time **		3.91	1.20		
Grade 5	712	20.94	6.44		
- Release Time **		4.19	1.29		
4-5 Adjustments				2.50	
K-5 TOTAL		139.84	78.82	1.74	80.56
Grade K-5 Special Day Class	13	34 :1 0.38	18 :1 0.34	0.00	0.34
Release time Special Day Class		0.08	0.07		0.07
MIDDLE SCHOOL					
Grade 6	730	36 :1 20.28	28 :1 5.79		
- Release Time		4.06	1.16		
Grade 6 Necessary Adjustments				1.12	
		36 :1	28 :1		
Grade 7	703	23.43	6.70		
Grade 8	640	21.33	6.10		
Grade 7-8 Adjustments				0.64	
6-8 TOTAL		69.10	19.75	1.75	21.50
Grade 6-8 Special Day Class	6	34 :1 0.21	18 :1 0.19		0.19
Release time Special Day Class		0.04	0.04		0.04
HIGH SCHOOL ***					
Grade 9	683	36 :1 22.77	28 :1 6.51		
Grade 10	703	23.44	6.70		
Grade 11	704	23.47	6.71		
Grade 12	630	21.02	6.00		25.92
		36 :1	18 :1		
Grade 9-12 Special Day Class	55	1.83	1.84		1.84
B-Tech	150	5.00	5.00		5.00
Grade 9-12 Adjustments				0.19	0.19
TOTALS	TOTAL 9-12	97.53	32.76	0.19	32.95
Elementary School	4,403	129.50	74.84	1.74	80.97
- Release Time		10.80	4.39	0.00	
Middle School	2,079	65.25	18.78	1.75	21.73
- Release Time		4.10	1.20	0.00	
High School	2,926	97.53	32.76	0.19	32.95
	9,408	307.18	131.97	3.69	135.66

BERKELEY UNIFIED SCHOOL DISTRICT
 CLASS SIZE REDUCTION FTE PLANNING DOCUMENT
 FY 2014-15 Proposal v 2014-02-25

BSEP/MEAS A PROJECTED EXPENSE FOR CSR

FTE Ave Compensation	89,100	\$11,758,500	\$328,400	\$12,086,900
Sub Ave Compensation	\$1,700	\$224,300	\$6,300	\$230,600
Direct Support	<u>\$2,870</u>	<u>\$378,800</u>	<u>\$10,600</u>	<u>\$389,400</u>
Preliminary Measure A Transfer	<u>93,670</u>	<u>\$12,361,600</u>	<u>\$345,300</u>	<u>\$12,706,900</u>

* 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

	<u>FTE</u>	<u>2013-14 Budget</u>
FTE based on CSR Formula	131.97	\$12,361,600
Necessary FTE to achieve class size ratios	<u>3.69</u>	<u>345,300</u>
Transfer from BSEP to GF for CSR	<u>135.66</u>	<u>\$12,706,900</u>
Discretionary		
Expanded Course Offerings - BHS and Middle Schools (including Subs and Direct Support)	8.00	749,360
Middle School Counseling Services	4.80	443,100
Program Support	10.60	962,600
Total Discretionary	<u>23.40</u>	<u>\$2,155,060</u>
Total projected BSEP/Measure A expense	<u>159.06</u>	<u>\$ 14,861,960</u>
Indirect Costs @ 7.22%		\$ 1,073,034
TOTAL EXPENDITURE BUDGET		<u>\$ 15,934,994</u>

Middle School Counseling Services:			
Willard	1.2 FTE	1.2	110,800
Longfellow	1.2 FTE	1.2	110,800
King	2.4 FTE	2.4	221,500
Total Counselors		<u>4.8</u>	<u>443,100</u>

Program Support			
Literacy Coaches	3.3 FTE	3.3	312,200
3/4/5 Combos	1.8 FTE	1.8	160,400
RtI2 teachers K-5	2.75 FTE	2.75	245,000
RtI2 teachers 6-8	2.75 FTE	2.75	245,000
Total Program Support		<u>10.6</u>	<u>962,600</u>

BERKELEY UNIFIED SCHOOL DISTRICT
CLASS SIZE REDUCTION FTE PLANNING DOCUMENT
 FY 2014-15 With Updated Enrollment and Averages v 2014-02-25

GRADE LEVEL	STAFFING	GENERAL	Meas. A	Meas. A	Meas. A
	ENROLLMENT	FUND *	CSR	Necessary	CSR
	BY GRADE	CLASS SIZE FTE	FTE	FTE	FTE
ELEMENTARY SCHOOL					
TK and Kindergarten	788	34 :1 23.18	20 :1 16.22	0.60	
Grade 1	755	22.21	15.54		
- Release Time		0.89	0.62		
Grade 2	741	21.79	15.26		
- Release Time		0.87	0.61		
Grade 3	730	21.47	15.03		
- Release Time		0.86	0.60		
1-3 Adjustments				-1.35	
		34 :1	26 :1		
Grade 4	664	19.53	6.01		
- Release Time **		3.91	1.20		
Grade 5	712	20.94	6.44		
- Release Time **		4.19	1.29		
4-5 Adjustments				2.50	
K-5 TOTAL		139.84	78.82	1.74	80.56
Grade K-5 Special Day Class	13	34 :1 0.38	18 :1 0.34	0.00	0.34
Release time Special Day Class		0.08	0.07		0.07
MIDDLE SCHOOL					
Grade 6	730	36 :1 20.28	28 :1 5.79		
- Release Time		4.06	1.16		
Grade 6 Necessary Adjustments				1.12	
		36 :1	28 :1		
Grade 7	703	23.43	6.70		
Grade 8	640	21.33	6.10		
Grade 7-8 Adjustments				0.64	
6-8 TOTAL		69.10	19.75	1.75	21.50
Grade 6-8 Special Day Class	6	34 :1 0.21	18 :1 0.19		0.19
Release time Special Day Class		0.04	0.04		0.04
HIGH SCHOOL ***					
Grade 9	683	36 :1 22.77	28 :1 6.51		
Grade 10	703	23.44	6.70		
Grade 11	704	23.47	6.71		
Grade 12	630	21.02	6.00		25.92
		36 :1	18 :1		
Grade 9-12 Special Day Class	55	1.83	1.84		1.84
B-Tech	150	5.00	5.00		5.00
Grade 9-12 Adjustments				0.19	0.19
TOTAL 9-12		97.53	32.76	0.19	32.95
TOTALS					
Elementary School	4,403	129.50	74.84	1.74	80.97
- Release Time		10.80	4.39	0.00	
Middle School	2,079	65.25	18.78	1.75	21.73
- Release Time		4.10	1.20	0.00	
High School	2,926	97.53	32.76	0.19	32.95
	9,408	307.18	131.97	3.69	135.66

BERKELEY UNIFIED SCHOOL DISTRICT
 CLASS SIZE REDUCTION FTE PLANNING DOCUMENT
 FY 2014-15 With Updated Enrollment and Averages v 2014-02-25

BSEP/MEAS A PROJECTED EXPENSE FOR CSR

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Preliminary Measure A Transfer	<u>93,670</u>	<u>\$12,361,600</u>	<u>\$345,300</u>	<u>\$12,706,900</u>

- * 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

	<u>FTE</u>	<u>2013-14 Budget</u>
FTE based on CSR Formula	131.97	\$12,361,600
Necessary FTE to achieve class size ratios	<u>3.69</u>	<u>345,300</u>
Transfer from BSEP to GF for CSR	<u>135.66</u>	<u>\$12,706,900</u>
Discretionary		
Expanded Course Offerings - BHS and Middle Schools (including Subs and Direct Support)	8.00	749,360
Middle School Counseling Services	4.80	443,100
Program Support	21.50	1,934,000
Total Discretionary	<u>34.30</u>	<u>\$3,126,460</u>
Total projected BSEP/Measure A expense	<u>169.96</u>	<u>\$ 15,833,360</u>
Indirect Costs @7.22%		\$ 1,143,169
TOTAL EXPENDITURE BUDGET		<u>\$ 16,976,529</u>

Middle School Counseling Services:			
Willard	1.2 FTE	1.2	110,800
Longfellow	1.2 FTE	1.2	110,800
King	2.4 FTE	2.4	221,500
Total Counselors		<u>4.8</u>	<u>443,100</u>

Program Support			
Literacy Coaches	3.3 FTE	3.3	312,200
Willard (M.S. Math)	0.8FTE	0.8	71,300
Longfellow (M.S. Math)	1.0 FTE	1	89,100
King (M.S. Math)	1.6 FTE	1.6	142,600
BHS (HS Math)	2.0 FTE	2	178,200
3/4/5 Combos	1.8 FTE	1.8	160,400
Rtl2 teachers K-5	5.5 FTE	5.5	490,100
Rtl2 teachers 6-8	5.5 FTE	5.5	490,100
Total Program Support		<u>21.5</u>	<u>1,934,000</u>

BSEP CSR Multi Year Projections
Based on CSR Recommendations for FY 2013-14

P&O v 2014-02-25

	Unaudited Actuals FY 2012-13	FY 2013-14	FY 2014-15	FY 2015-16	FY 2016-17
COLA - Revenues Only (A)	0.0165	0.01565	0.0086	0.022	0.025
Step Increase for teachers	0.0100	0.0100	0.0100	0.0100	0.0100
Indirect Cost	0.0639	0.0673	0.0722	0.0722	0.0722
Revenue					
Revenue Allocation	\$ 15,489,704	\$ 15,734,186	\$ 16,023,555	\$ 16,023,555	\$ 16,376,073
Prior Year Revenue		\$ 133,537			
COLA			\$ -	\$ 352,518.21	\$ 409,401.83
Total Revenue	\$ 15,489,704	\$ 15,867,723	\$ 16,023,555	\$ 16,376,073	\$ 16,785,475
Expenditures					
Transfer to General Fund for Classroom Teachers:					
- Classroom Teachers	11,729,105	11,711,600	12,051,300	12,171,813	12,293,531
- Illness Substitutes	231,080	225,800	229,900	232,199	234,521
- Direct Support	376,324	381,100	388,200	392,082	396,003
Expanded Course Offerings (8.0 FTE)	841,361	751,760	749,360	756,854	764,422
Certificated Counselors (4.8 FTE)	479,201	444,000	443,100	447,531	452,006
Program Support (21.9 and 21.50 FTE)	1,291,368	1,934,000	1,934,000	1,953,340	1,972,873
Indirect Costs @ 6.73% and 7.22%	955,205	1,039,668	1,140,461	1,151,866	1,163,384
Total Expenditure Budget	\$ 15,903,644	\$ 16,487,928	\$ 16,936,321	\$ 17,105,684	\$ 17,276,741
Net Change to Fund Balance	\$ (413,941)	\$ (620,205)	\$ (912,766)	\$ (729,611)	\$ (491,266)
Projected Beginning Fund Balance	\$ 1,315,750	\$ 901,809	\$ 281,605	\$ (631,162)	\$ (1,360,773)
Projected Ending Fund Balance	\$ 901,809	\$ 281,605	\$ (631,162)	\$ (1,360,773)	\$ (1,852,039)
CSR share of 3% Reserve	\$ 477,109	\$ 494,638	\$ 508,090	\$ 513,171	\$ 518,302
Total Ending Fund Balance	\$ 1,378,919	\$ 776,242	\$ (123,072)	\$ (847,602)	\$ (1,333,736)

A) Cost of Living Adjustments (COLAs) are included in revenue projections. COLAs for fiscal year 2014-15 through 2016-17 are projected and may not materialize.

	FY 2013-14	FY 2014-15	FY 2015-16	FY 2016-17
District is in salary negotiations - 1% salary increase cost	154,483	157,959	159,538	161,134

BSEP/Measure A of 2006
FY 2014/15 Revenue Projection
As of 2/25/14

	Resource	%	Projected Budget 2014/15	Indirect Costs 7.22%	Net
Revenue					
County Tax Collections			\$ 25,142,000		
City of Berkeley Tax Collections			\$ 220,000		
Rebates/Reduction in PY Receivable			\$ (120,000)		
Interest			\$ 15,000		
Total Projected Revenue			\$ 25,257,000		
Expenses					
County Collection Fees			\$ 427,414		
City of Berkeley Fees			\$ 50,000		
Audit and Legal Expense			\$ 6,000		
Total Expenses			\$ 483,414		
Net Revenue			\$ 24,773,586		
Available for Allocation			\$ 24,773,586		
Public Information/P&O	0854	2.00%	\$ (495,472)	\$ -	
Net Available for Allocation			\$ 24,278,114	\$ (1,634,844)	\$ 22,643,270

Resource Allocation					(a)	(b)	(a)-(b)
					FY 14/15	FY13/14	Difference
Class Size Reduction (66%)	0841	66.00%	\$ 16,023,555	\$ (1,078,997)	\$ 14,944,558	\$ 14,742,047	\$ 202,511
Site Discretionary (10.25%)	0852	10.25%	\$ 2,488,507	\$ (167,572)	\$ 2,320,935	\$ 2,289,485	\$ 31,450
Libraries (7.25%)	0860	7.25%	\$ 1,760,163	\$ (118,526)	\$ 1,641,637	\$ 1,619,391	\$ 22,246
Music/VAPA (6.25%)	0853	6.25%	\$ 1,517,382	\$ (102,178)	\$ 1,415,204	\$ 1,396,027	\$ 19,177
Parent Outreach (1.25%)	0857	1.25%	\$ 303,476	\$ (20,436)	\$ 283,041	\$ 279,205	\$ 3,836
PD/Evaluation/Technology (9%)							\$ -
Prof. Development	0855	36.00%	\$ 786,611	\$ (52,969)	\$ 733,642	\$ 723,700	\$ 9,942
Evaluation	0856	28.00%	\$ 611,808	\$ (41,198)	\$ 570,610	\$ 562,878	\$ 7,732
Technology	0862	36.00%	\$ 786,611	\$ (52,969)	\$ 733,642	\$ 723,700	\$ 9,942
Net Resource Allocation			\$ 24,278,114	\$ (1,634,844)	\$ 22,643,270	\$ 22,336,433	\$ 306,837
Public Information/P&O	0854		\$ 495,472	\$ -	\$ 495,472	\$ 486,524	\$ 8,948
Total Allocation to All Resources			\$ 24,773,586	\$ (1,634,844)	\$ 23,138,742	\$ 22,822,957	\$ 315,785

Notes/Assumptions for 2014/15

- COLA is assumed to be .86%
- Indirect Cost Rate for 2011/12: 6.7%, for 2012/13: 6.39%, for 2013/14: 6.73% for 2014/15: 7.22%
- Indirect Cost does not apply to Public Information/P&O Committee, Resource 0854
- A total of 9% of the BSEP revenue is allocated to three Resources: 0855, 0856, and 0862.
The distribution to these Resources may be determined administratively on an annual basis.
In FY 2013/14 the allocation was 36%, 28%, and 36% respectively.

