



BERKELEY UNIFIED SCHOOL DISTRICT  
BERKELEY SCHOOLS EXCELLENCE PROGRAM  
2020 Bonar Street, Third Floor  
Berkeley, CA 94702  
Phone: 644-8717 Fax: 644-8923

**MEETING NOTICE**

**COMMITTEE:** BSEP Planning & Oversight Committee  
**DATE:** Tuesday, April 15, 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
- 3. Chairperson’s Comments (*Chris Martin & Elisabeth Hensley*)
- 4. BSEP Director’s Comments (*Natasha Beery*)
- [Action] 5. Approval of Minutes 4.8.14
- 6. Public Comment
- [Presentation] 7:30 7. Updates and Next Plans: LCAP Draft Overview
- [Discussion/Action] 8:10 8. **Recommendation for the Allocation of BSEP Class Size Funds in FY 2014-15**
- [Presentation] 8:30 7. **Recommendation for BSEP Funds in FY 2014-15:** Music and Visual & Performing Arts (VAPA)
- [Presentation] 9:00 8. **Recommendation for BSEP Funds in FY 2014-15:** Library
- 9:30 10. Adjournment

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

**Next P&O Meeting: April 22, 2014**

*Discussion & Action: Recommendation for BSEP Funds 2014-15 – Library, Music and VAPA  
Presentation: Recommendation for BSEP Funds 2014-15 – PD, PE, and Technology*

**Next Subcommittee Meetings:**

**Tuesday, April 29, 2014,** Parent Outreach & Public Info, 7 pm, 2020 Bonar St #126  
**Tuesday, April 29, 2014,** Music and VAPA, 7 pm, Willard Middle School, Room D19C

**BSEP PLANNING & OVERSIGHT COMMITTEE MINUTES**

April 8, 2014

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

**P&O Committee Members Present:**

Moshe Cohen, <i>Pre-K</i>	Elisabeth Hensley, <i>King (co-Chair)</i>
Tim Frederick, <i>Cragmont</i>	Bruce Simon, <i>King</i>
Shauna Rabinowitz, <i>Jefferson</i>	Ellen Weis, <i>Longfellow</i>
Darryl Bartlow, <i>John Muir (Alt)</i>	Dawn Paxson, <i>Emerson/Willard</i>
Danielle Perez, <i>John Muir</i>	Margaret Phillips, <i>Willard</i>
Chris Martin, <i>LeConte (co-Chair)</i>	Aaron Glimme, <i>Berkeley High</i>
Catherine Huchting, <i>Malcolm X</i>	John Lavine, <i>Berkeley High</i>
Lea Baechler-Brabo, <i>Oxford</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>
Keira Armstrong, <i>Washington</i>	

**P&O Committee Members Absent:**

Lily Howell, <i>Pre-K (Alt)</i>	Kim Sanders, <i>Longfellow</i>
Sergio Duran, <i>Arts Magnet</i>	Larry Gordon, <i>Berkeley High</i>
Boyd Power, <i>Emerson</i>	Austin Lloyd, <i>BHS (Alt)</i>
Yusef Auletta, <i>LeConte (Alt)</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*  
Liz Karam, *Senior Budget Analyst – BSEP*  
Jay Nitschke, *Director of Technology*  
Becca Todd, *BUSD Library Coordinator*  
Julie Sinai, *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 7:17 p.m. Co-chair Chris Martin called the meeting to order by welcoming attendees, and by asking P&O members to introduce themselves.

**2. Establish the Quorum**

The quorum was approved with 14 voting members initially present, with 21 total voting members present later in the meeting. 13 voting members are required for a quorum.

**3. Chairperson's Comments**

*Co-Chairs Chris Martin and Elisabeth Hensley*

No comments were made.

**4. BSEP Director's Comments**

*Natasha Beery, BSEP Director*

Beery mentioned that she sent out an email to the Committee with a link to an article on Berkeleyside: "Illegal enrollment is boon and burden to Berkeley schools" by Mary Flaherty, April 8, 2014. The article and comments include a mention of BSEP funds and ADA funding, with considerable comment about whether to look at out-of-district students as bringing funds to the district or as using local funds.

<http://www.berkeleyside.com/2014/04/08/illegal-enrollment-is-boon-and-burden-to-berkeley-schools/>.

**5. Approval of Minutes 3.11.14**

**MOTION CARRIED (Simon/Glimme):** To approve the meeting minutes of the March 11, 2014 P&O Committee Meeting. The motion was approved with a showing of 13 hands, with no objections, and 1 abstention. The meeting minutes are to be revised to include Louise Harm's name as the representative for Independent Study.

**6. Public Comment**

There was no public comment.

**7. Subcommittee Report: BSEP Public Awareness, Library and Technology**

(This agenda item was moved up to accommodate the later arrival of Liz Karam, BSEP Senior Budget Analyst to present the CSR.)

*Lea Baechler-Brabo, BSEP Public Awareness Committee, Becca Todd, BUSD Library Coordinator, Jay Nitschke, Director of Technology*

Baechler-Brabo made a presentation to the P&O Committee on the BSEP Public Awareness Subcommittee meeting held March 18, 2014. She stated that the committee's task was to increase awareness of how BSEP supports our schools. The subcommittee meeting was an open brainstorming session that generated a list of ideas, images, words, and associations around BSEP. She handed out a *BSEP Awareness Mini-Brainstorm worksheet* to get input from the members of the P&O Committee around the question, "What associations or attributions describe our schools and students because of BSEP?" The BSEP Public Awareness Committee will return to the P&O Committee with a distillation of ideas and images. There was a discussion about keeping the message simple/basic, relating BSEP to teachers and some specific programs and services (school libraries, music programs etc.), tangible places to put BSEP out there (banner at the Performing Arts Showcase) and a suggestion to have the logo work donated. Raising awareness of BSEP will help the public understand how the current Measure strengthens educational opportunities for our students. It is connected but not the same thing as the process of planning for the next measure.

Becca Todd, *BUSD Library Coordinator* gave a brief report on the Library Subcommittee, which met on March 14, 2014. Even though the Library has a fund balance, it is deficit spending, and the budget must endure for the length of the Measure. This was the first year that there was a 0.5FTE dual-credentialed Teacher/Librarian at the elementary level, and the positive impact has been powerful so far. They would like to make it a full-time position even if it is made up of two 0.5FTEs. There was a suggestion to have a Teacher/Librarian, one per zone because they can address the increased need in technology,

computer awareness & teaching, and digital citizenship. There is a Library Subcommittee meeting Thursday, April 10, 2014 in the Technology Room 126 at the BUSD District Office at 7:00 pm.

Bruce Simon gave an update on the Technology Subcommittee, which met on March 25, 2014 in the Technology Room 126. Jay Nitschke, BUSD Technology Director, gave the Subcommittee an update that included the delivery and deployment of 700 Chromebooks to BUSD K-8 classrooms. These would be used for the Smarter Balance pilot testing. Nitschke also reported that some network issues might pop up as 1500 new devices were added to the network this year, and the new BHS building and School Board facilities were added to the network. Simon noted that those transitions went very smoothly. Some concerns for next year:

- There are two (2) TSAs who do professional development at the K-8 level out of one-time only funds. One was funded this year and for next year, but there will be no more funding after that. The other TSA was funded partly by BSEP and partly by Professional Development, and it is uncertain if there will be funds for that person next year. There is a concern by the Subcommittee about the need for professional development for teachers, as technology use is threaded throughout the Common Core Standards. Teachers are being asked to use devices in their classrooms, and they need support for how to use those devices.
- Simon mentioned that there was a discussion about a pilot for a one-to-one “Bring Your Own Device” model next year, which could happen with some small segment of classes/grade levels/schools, still to be determined. The students in those classrooms would be asked if their family had the means to provide a device, with some minimum specifications, and the District would provide devices for the rest of the students and the teachers would get some support for that. The pilot would see how that model would look. More needs to be done before decisions would be made.
- The Subcommittee talked about reviving the District Technology Committee, which would be more global, not a BSEP subcommittee. The District has a Technology Plan as required by the State of California; it mostly a compliance document and the District is supposed to write a new one next year. Reviving the District Technology Committee would provide a springboard for writing and completing a new plan and encourage District parents to give their time, energy and effort into creating a technology/instructional technology vision for the District going forward.

Nitschke stated that the State of California replaced the CST with the Smarter Balanced Assessment, and the pilot testing began Monday, April 7, 2014. He noted that the District had a pilot last year at Emerson, Oxford and Thousand Oaks Elementary Schools, and it went reasonably well. The District tested Cragmont 3/4/5 graders, Oxford 3/4/5 graders and Willard 6<sup>th</sup> graders. The tests have an English/Language Arts component, a Math component, and a performance component in one of those two areas where the teacher gives a 30-minute lesson before the digital device testing happens, and Nitschke felt that it went very well. Nitschke was at Cragmont for most of the day and noted that the kids were great, and despite some confusion, everyone had a “let’s just get through this” attitude.

Martin thanked all the subcommittees for their work.

**8. Recommendation for the Allocation of BSEP Class Size Funds in FY 2014-15:**

*Natasha Beery, BSEP Director and Liz Karam, Senior Budget Analyst – BSEP*

Beery provided the following handouts:

- *Recommendation for Allocation of BSEP Class Size Reduction Funds in FY 2014-15 from Neil Smith, Assistant Superintendent for Educational Services to the BSEP Planning & Oversight Committee, dated April 8, 2014*
- *BUSD Class Size Reduction FTE Planning Document – FY 2014-15 Proposal with Raises in Average Calculation v 2014-04-08 w/o Math*

Beery noted that this was the third time the P&O Committee would be seeing the CSR proposal. At the last meeting, Superintendent Cleveland asked the Committee to hold off on taking action on this budget because there were still some unknowns. The District had tried to find a way within the CSR Budget to keep middle school math class sizes small, from 1:20 to 1:24, but did not prove possible. Beery noted that negotiated raises and bonuses had an impact on the budget, and new multi-year projections have been done based on the recent negotiations. Beery stated that on page 3 of the *BUSD Class Size Reduction FTE Planning Document – FY 2014-15 Proposal with Raises in Average Calculation v 2014-04-08 w/o Math*, under Expenditures – Classroom Teachers, there is a 2.0% one-time bonus and 1.5% salary increase for FY2013-14 and a 2.0% ongoing increase for FY2014-15. Liz Karam noted that the increases will be paid this year and the ending fund balance will be \$275,855. For FY2014-15, the impact of the Net Change to Fund Balance of \$451,163 (the difference between revenues and expenditures) would create a negative Projected Ending Fund Balance of -\$175,308. Karam thought the numbers would be refined further because the budget cannot end up with a negative fund balance. The 3% Reserve provides a cushion but that reserve is needed to be in place at the end of the measure in order to provide a 3% for the next measure.

The “Teacher Template” constitutes Page 1 of *BUSD Class Size Reduction FTE Planning Document – FY 2014-15 Proposal with Raises in Average Calculation v 2014-04-08 w/o Math*. “Page 2” is the financial summary of “Page 1” and includes the estimated average teacher compensation of \$92,200, which includes all wage and fringe benefits. Beery noted that the last time the P&O Committee saw this document, the average teacher compensation was at \$89,100. The “Sub Ave Compensation” is the cost of substitutes that go along with having these additional teachers. “Direct Support” is the facilities impact for the extra classes and classrooms. The total cost for wage and fringe benefits will be \$12,507,400, which is \$1.2Million more than last year’s plan. Last year’s plan did not include all of the increases that were being negotiated later that year, (1% bonus, 2% bonus and 2.5% increase). Huchting wondered if Karam could provide a scenario showing a projected ending fund balance into the positive for years 2014-15, 2016-17, so the P&O Committee could see what that looks like. Beery stated that in order to have a positive fund balance without general fund adjustments, there would either have to be a change in class size ratios on “page 1,” from 1:20 to 1:24 or something in between, or continue to subtract from “page 2” and Math class size reduction was already subtracted from that. There was also savings on “page 2” from transferring RTI<sup>2</sup> costs to Special Ed.

In response to a clarification question about middle school math, Karam responded that the reduced class sizes for Math was introduced at least two years ago, in addition to “page 2.” RTI<sup>2</sup> expenses were introduced a few years ago, but there was enough savings in Special Ed that all of those expenditures don’t have to continue to be funded by BSEP. Karam stated that towards the end of the Measure, money is tighter, so some of the things that were added a few years ago are not affordable any more. Lazio questioned the \$28,716 remaining at the end of the Measure (page 3, Total Ending Fund Balance FY 2016-17), saying that it seems like a dangerously slim margin. Beery and Karam replied that it would suppose that the 3%

separate reserve might or might not be spent up until the end of the Measure, and that is an additional question, although currently the thinking is to keep the 3% reserve in place.

Glimme noted that the Committee had discussed expenditures quite extensively in the past few years and had produced letters and interpretations stating the priorities for funding are CSR first, Middle School Counseling and Expanded Course Offerings second, with Program Support being last. If cuts were to be made, it would be through Program Support first. He felt that there was quite a bit of Program Support funding that could help to balance the budget and could, in many cases, be moved into the funding from the State which will grow over the next few years. Beery noted that there were two streams of funding that would be coming into the District: Base funding and Supplemental funding. Supplemental funding is to be used for targeted students: Low income, ELL, High Needs Students and Foster Youth. There are some things that BSEP currently pays for that, in theory, the supplemental funding could pick up. However, there are those who think that if BSEP currently pays for something it should always continue to do so. The Committee discussed programs and funding. Hensley asked if the Committee could get numbers for 24:1 CSR, and what those savings would be. Nitschke replied that the change would need to be incremental, and would be in the range of \$500K per year.

There was a brief discussion regarding the LCAP funding, and Beery noted that the wish list had grown to about \$9M worth of suggested programs when the District was only going to get \$2.4M the first year. Frederick asked if the Committee was going to approve the budget as presented with a negative ending fund balance of -\$175,308K for FY 2014-15. Glimme noted that he had never been in the situation before where the P&O Committee was asked to approve a budget that was going to go into the negative. There was a discussion about what a huge departure it was to have a negative fund balance and such large budget variances from one year to another given the salary changes. Lazio brought up that the P&O Committee does not make the decisions about negotiations and wondered how changing class sizes would affect going into the next Measure. Hamill noted that if 1FTE were taken from each of the K-5 and 6-8 RTI<sup>2</sup>, that would close the negative fund balance for next year.

The Committee continued to discuss staffing, funding, enrollment, the shifting nature of the situation and ultimately decided that no action could be taken on this item. Concerns were also expressed about how funding would impact BTA and ISP positively or negatively.

The general consensus was that the budget needed to be sent back to be balanced. The Committee asked for the budget to be sent out to its members ahead of the next meeting.

**No action was taken on *Recommendation for Allocation of BSEP Class Size Reduction Funds in FY 2014-15 from Neil Smith, Assistant Superintendent for Educational Services to the BSEP Planning & Oversight Committee, dated March 8, 2014.* The P&O Committee sent the recommendation back and would take action for CSR Allocation at the next meeting on April 15, 2014.**

## **9. Updates and Next Plans: BSEP Measure Planning, Music Budget Update, LCAP Draft Proposal and Site Plans**

*Natasha Beery, BSEP Director*

Beery provided the following handouts:

- *Split-Roll Parcel Taxes Unlawful: Borikas v. Alameda Unified School District (2013) 214 Cap.App.4<sup>th</sup> 135* from The Point Educational Bulletin/Dannis Woliver Kelley 2014.

- *After legal ruling leaves some parcel taxes in jeopardy, clarity must come from Legislature*, EdSource, June 27<sup>th</sup> 2013 by John Fensterwald: <http://edsource.org/2013/after->

[legal-ruling-leaves-some-parcel-taxes-in-jeopardy-clarity-must-come-from-legislature/33981#.U0ThssdCM3Y](#)

- PowerPoint slides from Natasha Beery, *BSEP Director* and Suzanne McCulloch, *BUSD VAPA Program Supervisor* presentation of the BSEP Music Program to BUSD School Board

Beery reported on the BSEP Measure Planning Committee meeting with Superintendent Evans and Board President Josh Daniels and Director Julie Sinai. The group did not make any substantial changes to the calendar. They did discuss when and whether to engage outside assistance to work with the committee next fall. Beery followed up on past questions from the P&O Committee about the split roll tax. The California Supreme Court declined to review the lower court decision in the Alameda case. She handed out two articles on the split roll tax. Beery went on to say that in Alameda, they were charging a flat rate per parcel for residential and per square foot for commercial properties. One of the issues left unclear in the court ruling has to do with “uniform tax rates” and the question is not only whether you can charge residential and commercial rates differently, but whether you can make differentiations according to size of parcel, or have to charge a flat tax. Valery Tay is investigating how other parcel taxes are structured in the state. The BSEP Measure Planning group will expand in the fall.

Beery handed out the PowerPoint slides of the BSEP Music Program history and Funding trajectory that she and Suzanne McCulloch, *BUSD VAPA Program Supervisor* presented to the School Board on March 25, 2014. The first page of the handout shows the banner that was displayed at the Performing Arts Showcase. The program has been impacted by enrollment and staffing cost increases. There will be a draft Music/VAPA budget presentation to the Committee at the next meeting April 15, 2014. With the small COLA only bringing in about \$17,000 next year, deficit-spending has left a small fund balance, and there is a gap of \$205K for next year, which is about half the cost of the teacher transfer (which covers the cost of release time music teachers.) Beery stated that increased costs of Music staffing are still being calculated. One possibility is to have the GF pay for all or part of the release time teacher cost, as it does for release time teachers other than music. Other options presented included: Increase class sizes for the elementary schools, cut offerings in the middle schools, increase costs to families, or eliminate Arts Anchor. (See page 3 of handout.) Beery answered a question about shifting money between funds. The measure allows only for a shift between Library, Music, and Parent Outreach, of up to 10% of the allocation, as long as no more than 15% is given over the original allocation to any one fund. However, all of those funds are in deficit spending mode and shifts would affect program.

The Committee will have an update on LCAP at its next meeting on April 15. In addition, there will be an LCAP Update to the Board on April 9, 2014 and a Community Forum on LCAP/LCCP at Rosa Parks Elementary School at 7:00 pm on April 16, 2014. On April 24, 2014, the PAC and DELAC will review the draft, and then it will go to the Board on April 30. There will be public comment until about May. The deadline for Site Plans has shifted to April 30<sup>th</sup> to incorporate LCAP decisions. There was a very brief discussion about the Economic Recovery Target part of the LCAP.

## **10. Adjournment**

The meeting was adjourned by acclamation at 9:04 p.m.

# BERKELEY UNIFIED SCHOOL DISTRICT

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

## BACKGROUND INFORMATION

The *Berkeley Public Schools Educational Excellence Act of 2006* (Measure A of 2006) states:

*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. (Section 3-A-i)*

## Program Objectives

The Measure further states that “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.”

## Program Summary

### 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.
- Total average compensation (includes salary and employer paid fringe benefits) of classroom teachers is projected at \$92,200, an increase of \$6,100 per FTE over the prior year projection.
- 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 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 24:1, 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 24:1 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 **4.13 FTE** 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 **\$13,135,600**, an increase of \$1,209,700 over the 2013-14. This figure includes the FTE compensation, substitute compensation, as well as "direct support," which is 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 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: \$458,800**

### **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: \$774,640**

### **Program Support**

The 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 RTI<sup>2</sup> teachers** for the 11 elementary schools (.25 FTE at each elementary school).
- **2.75 FTE RTI<sup>2</sup> teachers** for the three middle schools (.75 FTE for Longfellow, .75 FTE for Willard, and 1.25 FTE at King)

**Projected expense: \$996,300**

**BUDGET SUMMARY**

With a COLA of 0.86% producing a small increase in revenue, and an increase of 4.13 FTE in classroom teachers coupled with higher salary costs, the deficit spending trend in the CSR budget has accelerated. Mitigations include:

- A shift of the costs of 5.5 FTE for RTI<sup>2</sup> to Special Education
- Elimination of the 5.4 FTE for math class size reduction in middle school and high school.
- A potential one-time offset at closing from the General Fund, reducing about \$200,000 of the costs of salary increases in order to yield a positive fund balance for the BSEP CSR resource.

Nonetheless, further reductions in program expenditures are likely to be necessary for subsequent years in order to maintain a fund balance for the remainder of the Measure, as can be seen in the BSEP CSR Multi Year Projection (Attachment B).

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

**Revenue Allocation**

\$16,023,555

**Projected Expenditures**

Interfund Transfer to General Fund

Classroom Teachers \$12,507,400

Illness Substitutes 238,800

Direct Support 389,400

Expanded Course Offerings (8.0 FTE) 774,640

Middle School Counseling (4.80 FTE) 458,800

Program Support (10.60 FTE) 996,300

Indirect Costs 1,109,378

**Total Expenditure Budget**

\$16,474,718

**Net Change to Fund Balance**

\$(451,163)

**Projected Beginning Fund Balance**

\$489,315

**Net Change to Fund Balance**

\$(451,163)

**Projected Ending Fund Balance**

\$38,152

**BERKELEY UNIFIED SCHOOL DISTRICT**  
**CLASS SIZE REDUCTION FTE PLANNING DOCUMENT**  
 FY 2014-15 Proposal with Raises in Average Calculation v 2014-04-08 w/o Math

GRADE LEVEL	STAFFING ENROLLMENT BY GRADE	GENERAL FUND * CLASS SIZE FTE	Meas. A CSR FTE	Meas. A Necessary FTE	Meas. A CSR FTE
<b>ELEMENTARY SCHOOL</b>					
TK and Kindergarten	788	23.18	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	
		<b>34 :1</b>	<b>26 :1</b>		
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	
<b>K-5 TOTAL</b>		<b>139.84</b>	<b>78.82</b>	<b>1.74</b>	<b>80.56</b>
Grade K-5 Special Day Class	13	0.38	0.34	0.00	0.34
Release time Special Day Class		0.08	0.07		0.07
<b>MIDDLE SCHOOL</b>					
Grade 6	730	20.28	5.79		
- Release Time		4.06	1.16		
Grade 6 Necessary Adjustments				1.12	
		<b>36 :1</b>	<b>28 :1</b>		
Grade 7	703	23.43	6.70		
Grade 8	640	21.33	6.10		
Grade 7-8 Adjustments				0.64	
<b>6-8 TOTAL</b>		<b>69.10</b>	<b>19.75</b>	<b>1.75</b>	<b>21.50</b>
Grade 6-8 Special Day Class	6	0.21	0.19		0.19
Release time Special Day Class		0.04	0.04		0.04
<b>HIGH SCHOOL ***</b>					
Grade 9	683	22.77	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
		<b>36 :1</b>	<b>18 :1</b>		
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
<b>TOTAL 9-12</b>		<b>97.53</b>	<b>32.76</b>	<b>0.19</b>	<b>32.95</b>
<b>TOTALS</b>					
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
	<b>9,408</b>	<b>307.18</b>	<b>131.97</b>	<b>3.69</b>	<b>135.66</b>

BERKELEY UNIFIED SCHOOL DISTRICT  
 CLASS SIZE REDUCTION FTE PLANNING DOCUMENT  
 FY 2014-15 Proposal with Raises in Average Calculation v 2014-04-08 w/o Math

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

FTE Ave Compensation	92,200	\$12,167,600	\$339,800	\$12,507,400
Sub Ave Compensation	\$1,760	\$232,300	\$6,500	\$238,800
Direct Support	<u>\$2,870</u>	<u>\$378,800</u>	<u>\$10,600</u>	<u>\$389,400</u>
Preliminary Measure A Transfer	<u>96,830</u>	<u>\$12,778,700</u>	<u>\$356,900</u>	<u>\$13,135,600</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>Budget</u>
FTE based on CSR Formula	131.97	\$12,778,700
Necessary FTE to achieve class size ratios	<u>3.69</u>	<u>356,900</u>
<b>Transfer from BSEP to GF for CSR</b>	<b><u>135.66</u></b>	<b><u>\$13,135,600</u></b>
<b>Discretionary</b>		
Expanded Course Offerings - BHS and Middle Schools (including Subs and Direct Support)	8.00	774,640
Middle School Counseling Services	4.80	458,800
Program Support	<u>10.60</u>	<u>996,300</u>
<b>Total Discretionary</b>	<b><u>23.40</u></b>	<b><u>\$2,229,740</u></b>
<b>Total projected BSEP/Measure A expense</b>	<b><u>159.06</u></b>	<b><u>\$ 15,365,340</u></b>
<b>Indirect Costs @ 7.22%</b>		<b><u>\$ 1,109,378</u></b>
<b>TOTAL EXPENDITURE BUDGET</b>		<b><u>\$ 16,474,718</u></b>

Middle School Counseling Services:			
Willard	1.2 FTE	1.2	114,700
Longfellow	1.2 FTE	1.2	114,700
King	2.4 FTE	2.4	229,400
<b>Total Counselors</b>	<u>4.8</u>		<u>458,800</u>

Program Support			
Literacy Coaches	3.3 FTE	3.3	323,100
Willard (M.S. Math)		0	-
Longfellow (M.S. Math)		0	-
King (M.S. Math)		0	-
3/4/5 Combos	1.8 FTE	1.8	166,000
RtI2 teachers K-5	2.75 FTE	2.75	253,600
RtI2 teachers 6-8	2.75 FTE	2.75	253,600
<b>Total Program Support</b>	<u>10.6</u>		<u>996,300</u>

**BSEP CSR Multi Year Projections**  
**Based on CSR Recommendations for FY 2014-15**

V2014-04-09

2.0% one bonus and 1.5% salary increase for FY 2013-14 and 2.0% ongoing FY 2014-15	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	0.024
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
<b>Revenue</b>					
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	\$ 393,025.76
<b>Total Revenue</b>	<b>\$ 15,489,704</b>	<b>\$ 15,867,723</b>	<b>\$ 16,023,555</b>	<b>\$ 16,376,073</b>	<b>\$ 16,769,099</b>
<b>Expenditures</b>					
<b>Staffing Enrollment</b>		9309	9408	9408	9408
Transfer to General Fund for Classroom Teachers:					
- Classroom Teachers	11,729,105	11,711,600	12,507,400	12,632,474	12,758,799
2.0% one bonus and 1.5% salary increase for FY 2013-14 and 2.0% ongoing FY 2014-15		409,900			
- Illness Substitutes	231,080	225,800	238,800	241,188	243,600
- Direct Support	376,324	381,100	389,400	393,294	397,227
Expanded Course Offerings (8.0 FTE)	841,361	751,760	774,640	782,386	790,210
Certificated Counselors (4.8 FTE)	479,201	444,000	458,800	463,388	468,022
Program Support (21.9, 21.50 & 10.6 FTE)	1,291,368	1,914,200	996,300	1,006,263	1,016,326
Reduction in RTI (5.5 FTE)		(485,100)			
2.0% one bonus and 1.5% salary increase for FY 2013-14 and 2.0% ongoing FY 2014-15		99,800			
One-Time Contribution from GF for negotiated salary increases (if needed)		(200,000)			
Indirect Costs @ 6.39%, 6.73% & 7.22%	955,205	1,027,157	1,109,378	1,120,471	1,131,676
<b>Total Expenditure Budget</b>	<b>\$ 15,903,644</b>	<b>\$ 16,280,217</b>	<b>\$ 16,474,718</b>	<b>\$ 16,639,465</b>	<b>\$ 16,805,859</b>
<b>Net Change to Fund Balance</b>	<b>\$ (413,941)</b>	<b>\$ (412,494)</b>	<b>\$ (451,163)</b>	<b>\$ (263,392)</b>	<b>\$ (36,760)</b>
<b>Projected Beginning Fund Balance</b>	<b>\$ 1,315,750</b>	<b>\$ 901,809</b>	<b>\$ 489,315</b>	<b>\$ 38,152</b>	<b>\$ (225,239)</b>
<b>Projected Ending Fund Balance</b>	<b>\$ 901,809</b>	<b>\$ 489,315</b>	<b>\$ 38,152</b>	<b>\$ (225,239)</b>	<b>\$ (261,999)</b>

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.