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**Berkeley Public Schools Educational
Excellence Act of 2006
(BSEP/Measure A)**

**Annual Report
FY 2014-15**

BERKELEY UNIFIED SCHOOL DISTRICT

TO: BSEP P&O Committee
FROM: Natasha Beery, Director of BSEP and Community Relations
DATE: January 12, 2016
SUBJECT: Annual Report of Revenue and Expenditures in FY 2014-15 of the *Berkeley Public Schools Educational Excellence Act of 2006* (BSEP/Measure A)

BACKGROUND INFORMATION

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

All BSEP revenue from *Measure A of 2006* is deposited, monitored and expended through the BUSD accounting system (QSS) in Fund 4 which is accounted for separately from the District's General Fund (Fund 1). BSEP Fund 4 revenue is allocated to each of the purposes delineated in the BSEP Measure in separate and distinctly coded Resources in accordance with the percentages specified by the measure¹.

The attached Annual Report displays the revenue and expenditures of each Resource of Fund 4 at the closing of Fiscal Year (FY) 2014-15, as well as a brief description of the status of projects funded through BSEP. Appendix A provides an overview of FY 2014-15 expenditures from carryover funds from BSEP Measure B of 1994, Funds 5, 6 and 7 and Measure B of 2004, Fund 8.

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

After 2% of net revenue is allocated to Resource 0854, 100% of the available revenues² are allocated to the following purposes and deposited in restricted accounts.

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

¹ BSEP Measure A, Section 2.

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

GUIDE TO READING THE ANNUAL REPORT

The Annual Report is organized to clearly display how the expenditures relate to the purposes of BSEP Measure A of 2006.¹

Overview and Status Report

Revenue is allocated to each of the purposes delineated in BSEP Measure A in separate and distinctly coded **Resources** in accordance with the percentages specified by the measure². Each Resource is introduced with a one to two page **Overview** of revenue and expenditures, including salaries, benefits, supplies and other operating expenses. This brief narrative also compares the budget with actual expenditures, and explains significant variances. The overview is followed by a brief status report, providing additional detail on the on the projects funded by each BSEP Resource.

Comparison Report

Following the overview of each resource is a **Comparison Report** which shows expenditures from FY 2013-14, compared to the FY 2014-15 budget (revised at Second Interim, January 31 2015), the (unaudited) actuals as of June 30, 2015, and the variance between the budget and actuals. This comparison report also shows a Fund Balance Analysis.

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

Revenue is projected in February for the following fiscal year, with budget allocations initially distributed to each of the Purposes of the Measure in the percentages delineated in the BSEP Measure. Since the District receives tax revenue at various points throughout the fiscal year, First and Second Interim budgets (at October 31 and January 31) provide the opportunity to revise budget calculations. At the fiscal “closing” of the year on June 30, the actual net revenue is recognized, and the distribution to Resources is made.

Indirect Costs

Each BSEP resource is charged for Indirect Costs. The Indirect Cost rate in FY 2014/15 was 7.22% and is calculated by a formula determined by the State. The rate is applied to all expenses and transfers and totaled \$1,660,054. The funds are transferred to the General Fund to support the District’s common functions such as Payroll, Purchasing, Human Resources and Plant Operations.

Transfers to General Fund

Two resources, Class Size Reduction (Resource 0841) and Music, Visual and Performing Arts (Resource 0853) transferred a total of \$13,283,856 to the General Fund. The transfers funded 132.34 FTE to reduce class sizes and 2.32 FTE for music teachers providing General Fund release time. The transfers also supported costs associated with the increased FTE.

Fund Balance and Reserves

A fund balance is maintained in a central resource (0000), to meet the 3% reserve required by the State. The fund balance totaled \$911,904 at the end of FY 2014/15 a reserve of 3.5%. In addition, there are Fund Balances for each resource, managed by the program supervisors and District administration.

¹ BSEP Measure A, Section 5.C

² BSEP Measure A, Section 5.A

**BSEP/Measure A of 2006
Revenue Allocation Summary
FY 2014/15**

	Resource	%	Budget 2014/15	Calculated Actuals (1)	Unaudited Actuals (2) As of 6/30/15	Variance
Revenue						
County Tax Collections			\$ 25,142,000	\$ 25,062,741		
City of Berkeley Tax Collections			\$ 220,000	\$ 226,633		
Rebates/Reduction in PY Receivable			\$ (120,000)	\$ (105,433)		
Interest			\$ 15,000	\$ 16,124		
Total Projected Revenue			\$ 25,257,000	\$ 25,200,064		
Expenses						
County Collection Fees			\$ 427,414	\$ 420,568		
City of Berkeley Fees			\$ 50,000	\$ 48,400		
Audit and Legal Expense			\$ 6,000	\$ 6,120		
Total Expenses			\$ 483,414	\$ 475,088		
Net Revenue			\$ 24,773,586	\$ 24,724,976		
Available for Allocation			\$ 24,773,586	\$ 24,724,976		
Public Information/P&O	0854	2.00%	\$ (495,472)	\$ (494,500)		
Net Available for Allocation			\$ 24,278,114	\$ 24,230,477		
Resource Allocation						
			(a)		(b)	(b)-(a)
Class Size Reduction (66%)	0841	66.00%	\$ 16,023,555	\$ 15,992,115	\$ 16,002,685	\$ (20,870)
Site Discretionary (10.25%)	0852	10.25%	\$ 2,488,507	\$ 2,483,624	\$ 2,485,265	\$ (3,241)
Libraries (7.25%)	0860	7.25%	\$ 1,760,163	\$ 1,756,710	\$ 1,757,870	\$ (2,293)
Music/VAPA (6.25%)	0853	6.25%	\$ 1,517,382	\$ 1,514,405	\$ 1,515,406	\$ (1,976)
Parent Outreach (1.25%)	0857	1.25%	\$ 303,476	\$ 302,881	\$ 303,081	\$ (396)
PD/Evaluation/Technology (9%)						\$ -
Prof. Development	0855	36.00%	\$ 786,611	\$ 785,067	\$ 784,586	\$ (2,025)
Evaluation	0856	28.00%	\$ 611,808	\$ 610,608	\$ 611,011	\$ (797)
Technology	0862	36.00%	\$ 786,611	\$ 785,067	\$ 785,586	\$ (1,025)
Net Resource Allocation			\$ 24,278,114	\$ 24,230,477	\$ 24,245,490	\$ (32,624)
Public Information/P&O	0854		\$ 495,472	\$ 494,500	\$ 497,787	\$ 2,315
Total Allocation to All Resources			\$ 24,773,586	\$ 24,724,976	\$ 24,743,277	\$ (30,309)

- (1) Calculated Actuals show how actual revenue would be distributed using the methodology used in the budget process.
- (2) Unaudited Actuals reflect the current year revenue recorded in the books for each Resource. Additional revenue was recognized in FY 2014/15 from the prior year which is not in this summary.

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

OVERVIEW: FY 2014-15

Purpose

Reducing Class Sizes at all K-12 schools, expanding course offerings at all secondary schools, and providing counseling services at each of the District's middle schools.

The goals for the class sizes to be achieved with these revenues are District-wide Average Class Sizes of 26:1 for the elementary schools grades K-5, 28:1 for the secondary schools, and 18:1 for continuation high school and other secondary opportunity programs. Average class sizes in the K-3 grades shall be reduced to 20:1 as long as state class size reduction funds are provided for that purpose at a level not less than currently funded by the State.

After resultant class sizes meet the goals stated above, additional teachers may be added first to allow for expanded course offerings and then for program support in schools in so far as the funds permit.

Budget Managers: Donald Evans, Superintendent
Pasquale Scuderi, Assistant Superintendent for Educational Services

REVENUE TRANSFERS TO THE GENERAL FUND

	<i>Budget</i>	<i>Actual</i>	<i>Variance</i>
Teacher Compensation (133.99 FTE)	(\$12,374,300)	(\$12,430,093)	(\$55,793)
Substitute Compensation	(\$239,600)	(\$240,798)	(\$1,198)
Direct Support	(\$390,700)	(\$392,651)	(\$1,951)

EXPENDITURES

	<i>Budget</i>	<i>Actual</i>	<i>Variance</i>
Certificated Teacher Salaries	\$1,325,163	\$1,313,518	(\$11,645)
Certificated Counselor Salaries	\$388,225	\$386,397	(\$1,828)
Employee Benefits	\$456,848	\$448,661	(\$8,187)
Indirect Costs	\$1,110,966	\$1,098,315	(\$12,651)

	<i>Beginning</i>	<i>Ending</i>	<i>Decrease</i>
Fund Balance	\$556,440	\$346,061	\$210,379

RESOURCE SUMMARY

This Resource continued to be closely monitored during FY 2014/15 to ensure that funds will be available through the end of the Measure. The original plan submitted to the Board included costs estimated to leave a fund balance of only \$38,000 at the end of 2014/15. After Board review and approval, expenses were reduced by moving the FTE for Response to Intervention (RTI) that had been funded by the General Fund through an expense transfer from BSEP Class Size Reduction, directly to the General Fund.

In addition, the contribution to the General Fund for Class Size Reduction was lower than the adopted budget because the FTE funded in the Teacher Template was estimated to be 135.66, but at closing was actually 133.9 FTE, a reduction of 1.76 FTE.

STATUS REPORT

The contribution of BSEP Class Size Reduction (CSR) Funds for classroom teachers is calculated each year using a planning tool known as the “Teacher Template.” The Teacher Template reflects BUSD student enrollment and staffing for the agreed-upon class size ratios to be paid from General Fund monies, and the ratios to be achieved with BSEP monies to reduce class sizes.

The Teacher Template is developed in the spring of the preceding school year and adopted by the Board of Education as part of the District’s Annual Budget in June. In the fall, when enrollment has somewhat stabilized, there can be increases to FTE if needed to maintain the Board-adopted class size ratios. Conversely, the FTE allocation may be reduced if enrollment does not meet projections. These changes may be reflected in the First or Second Interim Report of that school year or at the fiscal closing of the year.

When the books are closed in August, a final transfer is made from BSEP CSR to the General Fund to pay for class size reduction teachers based on the average actual cost of teacher compensation and the actual FTE. This reimbursement to the General Fund by BSEP is known as the “Teacher Transfer.”

The General Fund contribution is calculated based on 34:1 in the elementary schools, and 36:1 in the Middle Schools and High Schools. The BSEP contribution is calculated based on providing the classroom teachers that would bring those ratios to the level specified by the Measure, of 20:1 K-3 and 26:1 for other elementary grades, 28:1 for the Middle and High Schools, and 18:1 for continuation high school (B-Tech). In addition, BSEP has provided the funding for the “necessary FTE” required to round out required FTE. Class size reduction goals, as specified in the Measure, were met in FY 2014-15.

As of FY 2013-14, the new Local Control Funding Formula from the State changed class size reduction targets to 24:1 for K-3. In addition, the funding allocated by the State for CSR has been reduced from \$2.6M to \$1.9M, with the difference of \$.7M becoming part of the unallocated base grant. Despite this change in funding, a decision was made in the prior year to maintain class sizes at 20:1 through the end of the current measure in keeping with the intent of the Measure of 2006.

For 2014-15, BSEP Class Size Reduction (CSR) funds paid for 133.99 FTE for classroom teachers. This represents over 30% of the teaching staff in the district. There were sufficient funds to meet the class size reduction goals stipulated in the BSEP Measure, and provide 23.40 FTE for the additional purposes allowed by this resource: 4.8 FTE for Middle School Counseling, 6.4 FTE teachers for Expanded Course Offerings (ECO) and additional staff for Program Support. These expenses were charged directly to the BSEP Resource 0841. In FY 2014-15, these funds provided for:

- Middle School Counselors 4.80 FTE
- BHS Expanded Course Offerings 6.40 FTE
- Middle School Expanded Course Offerings 1.60 FTE
- Elementary Literacy Coaches 3.30 FTE
- 3/4/5 TWI Combination Classes (3 Schools) 1.80 FTE
- Elementary RTI Teachers 2.75 FTE
- Middle School RTI Teachers 2.75 FTE

For the 14-15 school year, there were some savings in the Expanded Course Offerings area largely attributable to personnel cost variances and an unfilled support lab of .04 FTE. In addition, there were savings for Literacy Coaches, TWI Combination class support and Response to Intervention (RTI) as staff was placed in open positions.

The expense for Middle School Counseling in the initial Plan was \$458,800. This was lower than the actual expense because it was based on the teacher rather than the counselor rate; as counselors work an extra 10 days per year this difference required correction. Ultimately, the budgeted \$496,640 for middle school counseling was within \$2,838.00 of the actual cost.

BERKELEY UNIFIED SCHOOL DISTRICT
BERKELEY SCHOOLS EXCELLENCE PROGRAM (BSEP)
CLASS SIZE REDUCTION (Measure A, Resource 0841)
Revenue and Expenditures
Comparison Report FY 2014/15

Purpose

Sixty-six percent (66%) of the available revenues of this measure *shall be dedicated annually to reducing class sizes at all K-12 schools, expanding course offerings at all secondary schools and providing counseling services at each of the District's middle schools.*

Budget Managers: Donald Evans, Superintendent

Pasquale Scuderi, Assistant Superintendent for Educational Services

	Audited Actuals 2013/14 As of 6/30/14	Adopted Budget 2014/15 As of 7/1/14	2nd Interim Budget 2014/15 As of 1/31/15	Unaudited Actuals 2014/15 As of 6/30/15	2nd Interim Budget vs. Unaudited Actuals 2014/15
REVENUE					
Revenue	15,984,697	16,023,555	16,119,290	16,100,054	(19,236)
BSEP Contribution to General Fund (1)	(12,083,984)	(12,588,900)	(12,374,300)	(12,430,093)	(55,793)
BSEP Direct Support (2)	(380,081)	(389,400)	(390,700)	(392,651)	(1,951)
BSEP Substitute Compensation (1)	(224,581)	(238,800)	(239,600)	(240,798)	(1,198)
NET REVENUE	3,296,051	2,806,455	3,114,690	3,036,512	(78,178)
EXPENDITURES					
Certificated Monthly Salaries (3)	1,681,608	1,328,053	1,325,163	1,313,518	(11,645)
Certificated Counselors Salaries (3)	380,892	390,253	388,225	386,397	(1,828)
Employee Benefits (3)	549,207	484,564	456,848	448,661	(8,187)
Unallocated Reserve	0	0	29,815	0	(29,815)
Indirect Costs	1,029,713	1,108,147	1,110,966	1,098,315	(12,651)
TOTAL EXPENDITURES	3,641,420	3,311,017	3,311,017	3,246,891	(64,126)
NET INCREASE (DECREASE)	(345,369)	(504,562)	(196,327)	(210,379)	(14,052)
FUND BALANCE ANALYSIS					
Beginning Fund Balance	901,809	556,440	556,440	556,440	0
Net Increase (Decrease) in Fund Balance	(345,369)	(504,562)	(196,327)	(210,379)	(14,052)
Ending Fund Balance	556,440	51,878	360,113	346,061	(14,052)

Notes

(1) The BSEP Contribution to the General Fund includes only Class Size Reduction classroom teachers for regular and Special Education and substitutes for those teachers. In FY 2010/11, the BSEP Contribution funded 136.72 FTE for classroom teachers. In FY 2011/12, it funded 130.49 FTE. In FY 2012/13, it funded 127.46 FTE. In 2013/14, it funded 132.34 FTE. In 2014/15 it funded 133.99 FTE.

The transfer to the General Fund was reduced at Second Interim as a result of a reduction in the average teacher cost calculation due to hiring teachers into vacancies budgeted at a higher cost than actuals.

(2) Operational and other costs associated with opening and maintaining additional classrooms.

(3) In 2014/15, total FTE directly charged to Class Size Reduction includes 10.6 FTE for Program Support, 8.0 FTE for Expanded Course Offerings in the Middle Schools and Berkeley High School, and 4.80 FTE for Middle School Counseling for a total of 23.40 FTE. This was a reduction of 5.4 FTE from the prior year for math coaches. Math coach funding was provided from other resources in 2014/15.

SCHOOL SITE DISCRETIONARY PROGRAMS
(BSEP Measure A, Resource 0852)

OVERVIEW: FY 2014-15

Purpose:

The School Governance Council shall develop recommendations to allocate these revenues for the personnel, services and materials required to deliver effective activities leading to improved student performance...Revenues may be used for...arts and sciences instruction, academic tutoring and counseling, athletics and student activities, and before and after school programs¹

**Budget Manager: Natasha Beery, Director of BSEP and Community Relations, with
 Valerie Tay, BSEP Program Specialist**

The budgeted revenue allocated to the BSEP School Discretionary program in FY 2014-15 was \$2,488,507. This allowed for allocations to the sites of \$230 per pupil.² No additional funds were allocated from the fund balance for this purpose. The expenditure budget for FY 2014-15 was based on this revenue allocation to each site, plus the carryover generated by unspent balances for each site.³

Each School Governance Council (SGC) developed a School Plan based on district goals as well as the articulated needs of each school. This is a summary of how BSEP Site Discretionary funds were utilized across the district to support the School Plans.

Staffing (72.8% of total actual expenditures)

Budget: \$1,910,447 Actual: \$1,808,076 Variance: (\$102,371)

- Certificated salaries \$ 874,278
- Classified salaries \$ 560,857
- Employee benefits \$ 372,941

The above figures are from the Unaudited Actuals for 2014-15 as of June 30, 2015.

Books and Supplies (9.5% of total expenditures)

Budget: \$262,758 Actual: \$236,658 Variance: (\$26,100)

¹ BSEP Measure A, Section 3.B.i

² Revenue is allocated to each school site based on the projected number of students for the year (CALPADS data). The projection is adjusted for Independent Study, BTA and Early Childhood Development and is based on an agreed-upon average enrollment. Independent Study enrollment is deducted from Berkeley High's CBEDs enrollment. For FY 2014-15, the adjusted projected enrollment was 9,965 students.

³ The **Fund Balance** consists of monies that are held centrally, as well as unspent balances from the prior year. Unspent balances include the difference between the budget allocated to each site and actual expenditures. In 2014-15, the unspent balance of \$472,456 was posted as carryover along with the associated Indirect Cost, once the books were closed in September.

Contracted Services (11.0% of total expenditures)

Budget: \$339,197 Actual: \$273,599 Variance: (\$65,598)

Indirect Costs (6.7% of total expenditures)

Budget: \$199,589 Actual: \$165,770 Variance (\$33,819)

Fund Balance

Beginning: \$622,999 Ending: \$639,278 Increase: \$16,279

RESOURCE SUMMARY:

In FY 2014-15, there was a reduction in the per pupil allocation from \$233 to \$230 due to the relatively flat revenue and decreasing fund balance available to supplement the allocation. Some sites has slightly increased allocations due to enrollment growth, others had minor decreases. The challenge was most significant at Berkeley High, where a reduction in enrollment from 3,060 in FY 2012-13 to 3,025 in FY 2013-14, as well as the reduced per-pupil allocation in 2014-15, created a challenge to maintain funding for existing programs and/or consider new options.

At the end of FY 2014-15, most sites had unexpended funds in their BSEP Site Discretionary budgets. On average, sites expended about 75% of their planned budgets, ranging from a low of 69% to a high of 96%. All BSEP School Discretionary dollars allocated, but unspent, by the sites at the end of FY 2014-15, have been carried over to this year's site budgets for expenditure in FY 2015-16.

STATUS REPORT

School Site Discretionary funds continued to provide a broad variety of programs during the school day, with significant resources funding certificated and classified positions for academic support and instruction. The next greatest expense was for instructional materials, with BSEP funds providing over 50% of instructional materials and equipment at some school sites, and district-wide, the allocation almost matching that from the General Fund. Many sites continued to fund contracts for academic and social-emotional support in the schools. At a number of sites, discretionary funds were allotted for enrichment and experiential learning opportunities in the form of art and music classes, gardening programs, and field trips. Although no two School Plans were alike, BSEP-funded resources primarily supported the District goals of improving academic achievement and promoting student success.

Summary of Programs Funded

- **Academic Support:**
 - **Pre-K:** Bookbag Literacy Program;
 - **K-5:** Literacy Coaches, in-school and afterschool academic intervention and tutoring programs, CalCorps BUILD tutors, curriculum coordinator;
 - **6-8:** IXL and Accelerated Reader subscriptions, WriterCoach Connection programs, Academic Counselors;

- **9-12:** BHS Student Academic Support Program (Student Learning Center, algebra tutors and study group leaders), Teacher on Special Assignment (TSA) to provide academic support for student athletes, English Learner Tutors, College/Career Advisors, Independent Study Program Study Skills Mentoring and Tutors.
- **Professional Development (Pre-K – 12):**
 - Teacher Hourly for staff collaboration, early-back days, and retreats;
- **Mentoring, Counseling, Behavioral Support, and Safety:**
 - **Pre-K:** Counseling/Universal Learning Support Services (ULSS) from Child Therapy Institute (CTI);
 - **K-5:** Parent Liaison, case management/family support from Child Therapy Institute, Bay Area Community Resources (BACR) and City of Berkeley Mental Health, RtI teaching/coordination, Mosaic Project diversity awareness program;
 - **6-8:** RtI coordination, Mentors from Keepin’ It Real program (Nikao Youth Enrichment Services) and Stiles Hall, Counselors, AVID program, Noon Directors;
 - **9-12:** College and Career Counseling at Berkeley High, R.I.S.E. Scholars/Mentors, College Prep class with Berkeley City College, and BTA Student Welfare and Attendance Specialist, .
- **Strengthening School-Family Connections:**
 - **K-5:** Rosa Parks Family Resource Center Parent Outreach contract, Parent Institute for Quality Education training, Parent Liaison;
 - **6-12:** Independent Study K-8 Program Coordinator, Berkeley High School Parent Resource Center, BHS Volunteer Coordinator, BHS Bilingual Home-School Liaison.
- **Arts and Movement:**
 - **Pre-K:** Dance classes and YMCA P.E. program;
 - **K-5:** Visual Arts, Dance, Music, and Drama classes, Physical Education instruction, Berkeley YMCA P.E. & recess program;
 - **6-8:** Music Teacher, after-school performing arts and media classes, after-school athletics;
 - **9-12:** BHS Jazz program sectional instruction, and Afro-Haitian Dance class.
- **Other Enrichment Programs:**
 - **Pre-K:** Kindergarten visits, field trip transportation and admissions;
 - **K-12:** Garden programs and AmeriCorps garden volunteers, grade-level field trips such as Sierra Outdoor School.
- **Instructional Materials & Equipment (Pre-K-12):**
 - **Science:** consumables and lab equipment, garden supplies;
 - **Math:** web-based math program;

- **Art:** visual art supplies and equipment, performing arts materials;
- **Literacy:** classroom library books;
- **Technology:** Chromebooks, software subscriptions, document cameras and carts.

**BERKELEY UNIFIED SCHOOL DISTRICT
 BERKELEY SCHOOLS EXCELLENCE PROGRAM (BSEP)
 SCHOOL SITE DISCRETIONARY PROGRAM (Measure A, Resource 0852)
 Revenue and Expenditures
 Comparison Report FY 2014/15**

Mission Statement

Ten and a quarter percent (10.25%) of the available revenues generated by this measure is *allocated annually as School Discretionary Funds to each K-12 school on a per pupil basis. Existing district preschools shall receive a similar allocation for each full time student. The School Governance Council shall develop recommendations to allocate these revenues for the personnel, service and materials required to deliver effective activities leading to improved student performance.*

Budget Managers: Natasha Beery, Director of BSEP and Community Relations

Valerie Tay, BSEP Program Specialist

	Audited	Adopted	2nd	Unaudited	2nd
	Actuals	Budget	Interim	Actuals	Interim
	2013/14	2014/15	2014/15	2014/15	Budget vs.
	As of	As of	As of	As of	Unaudited
	6/30/14	7/1/14	1/31/15	6/30/15	Actuals
					2014/15
REVENUE	2,483,010	2,488,507	2,503,375	2,500,382	(2,993)
EXPENDITURES					
Certificated Salaries	812,700	734,571	940,006	874,278	(65,728)
Classified Salaries	601,932	612,321	563,039	560,857	(2,182)
Employee Benefits	366,111	442,777	407,402	372,941	(34,461)
Books & Supplies	190,001	98,017	262,758	221,853	(40,905)
Equipment	19,459	0	10,337	14,805	4,468
Unallocated Reserve	0	157,387	241,667	0	(241,667)
Contracted Services	324,162	246,877	339,197	273,599	(65,598)
Indirect Costs	155,757	165,478	199,589	165,770	(33,819)
TOTAL EXPENDITURES	2,470,121	2,457,428	2,963,995	2,484,103	(479,892)
NET INCREASE (DECREASE)	12,889	31,079	(460,620)	16,279	476,899
FUND BALANCE ANALYSIS					
Beginning Fund Balance	610,110	622,999	622,999	622,999	0
Net Increase (Decrease) in Fund Balance	12,889	31,079	(460,620)	16,279	522,934
Ending Fund Balance	622,999	654,078	162,379	639,278	522,934

Notes

Revenue is allocated to each school site based on the projected number of students for the year (CALPADS data). The projection is adjusted for Independent Study, BTA and Early Childhood Development and is based on an agreed-upon average enrollment. Independent Study enrollment is deducted from Berkeley High's CBEDs enrollment. For FY 2010/11, the adjusted projected enrollment was 9,538 students. In FY 2011/12, it was 9,814. In FY 2012/13, it was 9,679 and in FY 2013/14 it was 9,756 and in FY 2014/15 it was 9,965.

Committee (BAESC), Cazadero Music Camp, the Berkeley Symphony Music in the Schools program (MITS), The Music Connection (TMC), the Performing Arts Showcase, along with scholarships and tutors for students in need.

Highlights of the Music and VAPA program from 2014-15 include:

- For the third year, BUSD was selected as one of the "Best Communities for Music Education 2015" by the NAMM Foundation. The award reads "For Outstanding Support of Music Education, Enriching the Lives of Children and Advancing Student Achievement."
- All fourth and fifth graders participated in the program, regardless of ability to pay for instruments. Options have been expanded to include ukulele, guitar, drumline, and mariachi instruction.
- Due to strategic hiring and scheduling, it has been possible to offer more of the above classes each year district-wide.
- All students were provided with a well-functioning instrument of their choosing, grade level method books, supplemental sheet music, and necessary accessories such as strings, valve oil and cork grease.
- Music teachers began "in house" cultural relevancy training.
- Music teachers continued to use PBIS "You Rock" and "Out of Tune" slips in conjunction with "Toolbox" concepts with their grade 3-8 students.
- 343 students played the National Anthem at a Giants game in May.
- Collaborative partnerships provided workshops, tutoring, and performances by professional musicians for Berkeley students K-12.
- Five middle school bands and orchestras competed at the regional level at California Music Educator Association festivals. Two students were elected for state honor ensembles.
- The middle school jazz bands played at Freight and Salvage and Yoshi's.
- Many middle school students played and/or sang in multiple ensembles.
- The winter and spring concerts were very well-attended, especially at the middle schools, where the students played to packed houses. Nearly 2000 family and community members attended the Performing Arts Showcase in March 2015.

BERKELEY UNIFIED SCHOOL DISTRICT
BERKELEY SCHOOLS EXCELLENCE PROGRAM (BSEP)
MUSIC , VISUAL AND PERFORMING ARTS (Measure A, Resource 0853)
Revenue and Expenditures
Comparison Report FY 2014/15

Purpose

Six and a quarter percent (6.25%) of the available revenues generated by this measure *shall be allocated annually to providing quality instructional programs in music and the visual and performing arts for elementary and middle school students. Revenues may be used for, but are not restricted to, providing qualified teachers and staff, professional development in the arts, musical instruments and instructional materials, services and equipment necessary to conduct these programs.*

Budget Managers: Pasquale Scuderi, Assistant Superintendent for Educational Services
Suzanne McCulloch, VAPA Program Supervisor

	Audited Actuals 2013/14 As of 6/30/14	Adopted Budget 2014/15 As of 7/1/14	2nd Interim Budget 2014/15 As of 1/31/15	Unaudited Actuals 2014/15 As of 6/30/15	2nd Interim Budget vs. Unaudited Actuals 2014/15
REVENUE					
Revenue	1,513,702	1,517,382	1,526,447	1,524,472	(1,975)
Transfers to General Fund (Release Time) (1)	(412,448)	(236,728)	(236,728)	(220,316)	16,412
NET REVENUE	1,101,254	1,280,654	1,289,719	1,304,156	14,437
EXPENDITURES					
Certificated Salaries	706,742	722,070	709,195	707,311	(1,884)
Classified Salaries	48,853	48,415	51,397	49,203	(2,194)
Employee Benefits	180,382	207,637	183,931	181,228	(2,703)
Instructional Materials/Instruments (2)	81,272	85,000	109,864	90,859	(19,005)
Equipment	3,533	3,000	38,653	40,542	1,889
Unallocated Reserve	0	13,656	3,000	0	(3,000)
Conference/Mileage/Instructional Contracts	82,545	106,700	127,662	100,896	(26,766)
Capital Outlay	0	0	0	0	0
Indirect Costs	102,012	102,603	105,561	100,384	(5,177)
TOTAL EXPENDITURES	1,205,338	1,289,081	1,329,263	1,270,423	(58,840)
NET INCREASE (DECREASE)	(104,084)	(8,427)	(39,544)	33,733	73,277
FUND BALANCE ANALYSIS					
Beginning Fund Balance	272,256	168,172	168,172	168,172	0
Net Increase (Decrease) in Account Balance	(104,084)	(8,427)	(39,544)	33,733	73,277
Ending Account Balance	168,172	159,745	128,628	201,905	73,277

Notes

(1) During FY 2010/11, this resource funded 6.84 FTE for Music and Visual and Performing Arts Teachers and funded 3.84 FTE for release time music teachers through a transfer to the General Fund. In FY 2011/12, the numbers were 7.08 FTE and 4.40 FTE respectively. In FY 2012/13, the numbers were 7.82 FTE and 4.56 FTE, respectively. In 2013/14 this Resource funded 7.96 FTE for Music and Visual and Performing Arts Teachers and 4.56 for Release Time music teachers. In 2014/15, this Resource funded 7.83 FTE for Visual and Performing Arts and 2.32 FTE for Release time.

(2) At Second Interim, \$20,982 of expense for instrument replacement was transferred to funds donated for instrument use.

Awareness materials, the A+ News, maintenance of the District website, Bi-Annual report and other outreach and information efforts continued during the year. At closing, \$7,580 of expense for hourly work and \$3,902 of expense for contract services was transferred to Fund 5 (BSEP 1994), reducing the expense for Fund 4 for Measure A.

STATUS REPORT

The core functions supported by this budget in FY 2014-15 and highlights from the past year included:

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

The BSEP Director and Program Specialist have responsibility for:

- Implementation and monitoring of operational and technical tasks for the BSEP programs, working alongside the Senior Budget Analyst to ensure careful oversight of fund expenditures;
- Partnership with each school Principal and School Governance Council to analyze and develop the BSEP School Discretionary Fund budget and plan;
- Support for the September School Governance Council (SGC) elections and the appointment of P&O Representatives from each school site in October;
- SGC and Parent Leader Orientation Workshops in October, and Orientation for new P&O Representatives in November.
- Preparation of the annual SGC Elections, Diversity, and Activity Report for the Board in December;
- Planning and facilitation of 14 P&O Committee meetings and support for 12 P&O Subcommittee meetings, providing documents, coordinating guest speakers, and preparation of presentations.
- Planning and facilitation of BSEP Measure Planning activities, including meetings with the Executive Cabinet, the Superintendent's Measure Planning Workgroup, Management Team and Principal's Meetings, School Board Meetings and Public Forums.

District Communications and Community Relations

- The BSEP Director convened the Communications Team on a biweekly basis to ensure continued improvement in communications with families, staff and the wider Berkeley community. The Communications Team includes staff members from Parent Outreach, Translation, the Superintendent's Office, and Technology, and makes strategic use of outside contractors for some content, consultation, translation, printing, and mailing services.
- In FY 2014-15, some of the "top content" items that needed consistent communication and strategic community involvement, included:
 - Local Control and Accountability Plan
 - District Finances/Budget
 - Planning for Enrollment Growth and Facilities
 - New Smarter Balanced Assessments (SBA)
 - BSEP Renewal Planning

- Black Lives Matter Protests and Community Forum
- Storm-related School Closure
- BHS Principal Search
- Transition to Live-Streaming of School Board Meetings
- To reach our varied audiences and meet their diverse communication needs, a combination of media tools and channels were employed, including: our website, homepage blog posts, school and community postings/flyers, letters to families, online surveys, email, phone blasts, school newsletters, community forums, and participation at community events.
- The *A+ eNews*, produced in both English and Spanish on a bi-monthly basis, is the primary communication tool for keeping families and community apprised of the events, programs, services, and new initiatives in Berkeley public schools through direct subscriber email delivery and website access. In addition, limited paper copies are provided at school sites. The *A+ eNews* is sent electronically every two weeks to over 2,000 staff and over 7,000 parents and community members. It is translated into Spanish and sent to a growing list of Spanish-language subscribers (currently at 284 households).
- The Website is our community's entry to immediate information about district programs and services, departments, facilities, and new initiatives, with the most visited pages being those covering Admissions, Human Resources, District Calendar, and the School pages. Blog posts on the homepage are used to serve as a source for immediate updates and meeting postings, and link the reader to other related pages on the website.
- The Biannual Report is a four page document produced in the fall and mailed to 46,000 residential addresses in Berkeley. It was also translated into Spanish, and both English and Spanish print versions were distributed at schools. The fall 2014 publication focused on LCAP, and included articles on libraries, school grounds, Berkeley Adult School, and BSEP. The Spring 2015 issue focused on the District Budget and on BSEP Measure planning, and included articles on our Bridge program, enrollment growth, and master plan for school facilities.

Public Information Officer

- Produced a Board Update, posted on the BUSD website following every Board meeting, including a summary of agenda items, Board decisions, and Vimeo clips from key presentations and discussions;
- Compiled and distributed the *Weekly Bulletin* to principals and other administrators and staff;
- Provided community outreach related to Facilities and Maintenance Projects, including project and meeting postings at construction sites, and on the district website;
- Responded to requests from news media and community members;
- Covered district issues and student events, including documenting and photographing student activities, district meetings, and community forums.

Translation and Interpretation

When the BUSD English Learner (EL) population exceeds 15% for the Spanish language, key district documents must be translated into Spanish. In addition, the enrollment at five Berkeley

schools approaches or exceeds 15% of students who are Spanish-speaking, creating increased demand for document and meeting/event interpretation. The full-time Translation and Interpretation Specialist position is co-funded 50% with the General Fund and 50% from BSEP Resource 0854. In 2014-15, the BSEP Office and Translation Specialist provided Spanish translation and interpretation to support district-wide and school site-specific communications, including:

Translation of Documents included:

- A+ Newsletter (every two weeks)
- Biannual Report (twice yearly)
- Welcoming letters and message from Superintendent
- Letters re SBA testing from Superintendent and from Principals
- SBA Presentation from BREA
- Student Services Forms for Suspensions and Expulsions (16 documents)
- Student Forms: Emergency Cards
- BHS PTSA Statements for BSEP and SSC Candidates
- LCAP Documents and Powerpoints
- DELAC Documents and Powerpoints
- Translation of document and power point presentations for LCAP
- BEARS and LEARNS communications
- Translation of Parent Student Handbook - 48⁺ pages
- IEP Documents
- Educational Services Documents
- Sexual Harassment Policy and Regulations

Simultaneous Interpretation:

- Interpretation for community forums, including SGC training
- Interpretation offered at every Board Meeting
- Interpretation for DELAC
- Office of Family Engagement and Equity translation and interpretation
- Recording of numerous telephone blasts from Office of Family Engagement and Equity and Superintendent's Office
- Interpretation for Tool Box Project workshops
- IEP meetings (10 meetings)
- Interpretation for Student Services for Latino families and SARBS (5-7 meetings)

In order to ensure the inclusion of families who require communication in a language other than English, contracted interpretation services are available via the Language Line, a telephone-based service providing simultaneous translation in many languages. Use of Language Line continues to increase, with users (Principals, teachers, Admissions department) reporting very high quality services offered in a wide variety of languages. In addition, our hourly on-call interpreters have provided interpretation for parent meetings in Spanish and Arabic.

**BERKELEY UNIFIED SCHOOL DISTRICT
 BERKELEY SCHOOLS EXCELLENCE PROGRAM (BSEP)
 PUBLIC INFORMATION , TRANSLATION,
 P&O COMMITTEE SUPPORT (Measure A, Resource 0854)
 Revenue and Expenditures
 Comparison Report FY2014/15**

Purpose

Two percent (2%) of the revenues from this measure shall be utilized *for public information, translation services for District families and support of the Planning and Oversight Committee.*

Budget Manager: Donald Evans, Superintendent

Natasha Beery, Director of BSEP and Community Relations

	Audited	Adopted	2nd	Unaudited	2nd
	Actuals	Budget	Interim	Actuals	Interim
	2013/14	2014/15	2014/15	2014/15	Budget
	As of	As of	As of	As of	vs.
	6/30/14	7/1/14	1/31/15	6/30/15	Unaudited
					Actuals
					2014/15
REVENUE	494,271	495,472	498,432	497,787	(645)
					0
EXPENDITURES					0
Classified & Certificated Salaries	314,745	324,075	327,495	310,416	(17,079)
Employee Benefits	111,415	112,595	114,659	110,208	(4,451)
Materials and Supplies	2,764	27,000	26,600	3,247	(23,353)
Unallocated Reserve	0	14,782	9,298	0	(9,298)
Equipment	3,365	8,000	8,400	8,307	(93)
Contracted Services	78,652	111,000	111,000	89,298	(21,702)
TOTAL EXPENDITURES	510,940	597,452	597,452	521,476	(75,976)
NET INCREASE (DECREASE)	(16,669)	(101,980)	(99,020)	(23,689)	75,331
FUND BALANCE ANALYSIS					
Beginning Fund Balance	338,207	321,538	321,538	321,538	0
Net Increase (Decrease) in Fund Balance	(16,669)	(101,980)	(99,020)	(23,689)	75,331
Ending Fund Balance	321,538	219,558	222,518	297,849	75,331

RESOURCE SUMMARY

The BUSD professional development program has used BSEP resources to fund professional development in conjunction with state and federal resources. This strategy led to a relatively large fund balance in prior years, but then shifted to more significant deficit spending in FY 2012-13. In FY 2014-15, other resources were available to fund some of the hourly work, stipends and consultants, resulting in savings for BSEP funds. Also, the projection was to fund 6.05 FTE of professional development salaries, but this was reduced to 5.95 with a shift of .10 FTE to other funding.

STATUS REPORT

In 2014-15, Professional Development priorities included a focus on literacy, support for new teachers, a focus on building cultural competency, and support in implementing the Common Core State Standards. Highlights from last year included:

- Support for the Teacher College Reading and Writing Project (TCRWP) curriculum to meet the diverse needs of K-5 students;
- Professional Learning Communities for Literacy Coaches, ensuring the implementation of best practices throughout the district;
- The development and use of more common assessments followed by collaborative analysis of student performance;
- Using teacher leaders as liaisons collaborating together, providing professional development, and supporting sites with curriculum implementation and use of effective instructional strategies;
- Support of teacher teams in professional learning communities at the high school with a focus on lesson study, action research and support in implementing Constructing Meaning strategies;
- Training and support in implementing a system of Positive Behavioral Intervention and Support at pre-K–8 sites, including professional development on Toolbox, a social emotional curriculum used in the schools, grades K-6;
- Guidance and support for teachers to use a variety of educational technology tools, such as online tutorials, interventions, diagnostics, Google Applications for Education, and other resources;
- Guidance and support for teachers in integrating technology into student learning and improving students' digital skills;
- Support in building cultural competency by providing foundational knowledge for infusing culturally responsive practices into instruction.

**BERKELEY UNIFIED SCHOOL DISTRICT
BERKELY SCHOOLS EXCELLENCE PROGRAM (BSEP)
PROFESSIONAL DEVELOPMENT
Revenue and Expenditures (Measure A, Resource 0855)
Comparison Report FY 2014/15**

Purpose

Nine percent (9%) of the available revenues *shall be dedicated to providing professional development for the District's teachers and staff, to assessing the effectiveness of the District's educational programs for improving student achievement, and to providing and maintaining computers and technology in schools.*

Budget Manager: Pasquale Scuderi, Assistant Superintendent for Educational Services
Michelle Sinclair, Coordinator of Professional Development

	Audited Actuals 2013/14 As of 6/30/14	Adopted Budget 2014/15 As of 7/1/14	2nd Interim Budget 2014/15 As of 1/31/15	Unaudited Actuals 2014/15 As of 6/30/15	2nd Interim Budget vs. Unaudited Actuals 2014/15
REVENUE	785,703	786,611	791,311	789,524	(1,787)
EXPENDITURES					
Certificated Salaries (1) (2)	569,393	541,742	545,982	514,543	(31,439)
Classified Salaries	47	0	0	0	0
Employee Benefits (1) (2)	137,804	142,516	134,947	131,250	(3,697)
Unallocated Reserve	0	32,317	35,646	0	(35,646)
Services & Other Operating Expenses	15,184	100,000	100,000	81,143	(18,857)
Indirect Costs	48,619	58,957	58,957	52,485	(6,472)
TOTAL EXPENDITURES	771,047	875,532	875,532	779,421	(96,111)
NET INCREASE (DECREASE)	14,656	(88,921)	(84,221)	10,103	94,324
FUND BALANCE ANALYSIS					
Beginning Fund Balance	191,626	206,282	206,282	206,282	0
Net Increase (Decrease) in Fund Balance	14,656	(88,921)	(84,221)	10,103	94,324
Ending Fund Balance	206,282	117,361	122,061	216,385	94,324

Notes

- (1) \$50,000 for Teacher Initiated Professional Development is included in the salary, benefits and services expenses.
(2) The original plan included funding for 2.75 FTE. .1 FTE was moved to Title II after budget adoption.

RESOURCE SUMMARY: In 2014-15, the fund balance allowed for the increase in stipends for Illuminators to roll out the Common Core Report Card and Assessments. The adopted budget was for benefits were reduced as a result of newer staff.

STATUS REPORT

Following is a summary report of the activities accomplished with this BSEP Resource during FY 2014-15. Additional activities funded through other sources are not detailed in this report.

<u>Professional Development / Training Delivered by BREA Staff</u> ⁴	<u>Number of Trainees</u>
• 7 Illuminate Assessment System training days	~20-25 per training
• Site-Level K-5 Online Report Card Training	~20-25 per training
• Site-Level Survey Monkey Trainings	~25 total (SGC by Site)
• 10 BHS data and administrative trainings	~75 total
• 10 Administrative trainings (Program Evaluation / LCAP)	~30 per training
• Site Based Professional Development / Support	All Schools, 1 to 2 times per week

District Assessment Support: Provided production support for all district assessments, which includes test duplication and distribution, design of assessments using Illuminate, scanning and reviewing scores for accuracy, and score reporting (see list for subjects and frequencies). SQL, PowerPoint and Excel used by the Director and Data Technician to Produce the Reports. Assessments were in English Language Arts (ELA) for Grades 1-11 and three times a year for Elementary and Middle School; twice a year for High School. Writing for MS was four times year. This is the fourth year a Kindergarten Universal Screener was conducted and Kindergarten staff also assessed students in ELA. In addition, the high-school conducted common assessments in Mathematics, World Language, Social-Science and Science.

School Principal Support: All 18 Pre-K-12 principals (including Independent-Study and Berkeley Technology Academy) received one-on-one support at their school sites on a regular basis (at least bi-weekly). Activities included support for LCAP / Single Plan Evaluation series, providing supplementary data analysis, assisting principals to plan or prepare data presentations to staff or School Governance Council (SGC), and supporting principals and support staff (Literacy Leaders, Math Teacher Leaders, Response to Intervention Staff, English Learner Staff, etc.) in using Illuminate, Survey Monkey or PowerSchool. In 14-15, all schools received support in the implementation of the new Smarter Balanced Assessment in the classroom environment.

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

- 15 School Board Data Presentations
- 17 District and School Information Sheets (in English and Spanish)
- 18 Data Presentations for SGC or SSC and School Staff (all schools)

⁴ (Contracted software / systems paid for by BSEP funds such as Illuminate, Key Data Systems, Amplify, SQL and SurveyMonkey are listed by name.)

- Class Profile reports in Illuminate for every classroom teacher, K-9
- 20 District Assessment Summary reports

BHS and BTA WASC, Career Pathways Trust and Small Learning Community (SLC) Support: Trained BHS and BTA site Teachers on Special Assignment (TSA) on Illuminate and provided data presentation summaries for use with WASC accreditation. Provided data support for the High-School Small Learning Communities and Career Pathways / College Career Readiness work.

2020 Vision Support and Partnership: Director D'Angelo participated with Director Pat Saddler in the implementation of Phase III of the 2020 which included a series of five day-long 2020 meetings with City and Alliance staff. In addition, over 1,000 plus hours of meetings and data-analysis were conducted with 2020 partners.

Assessment Development:

Organized and facilitated meetings with ELA and math teacher leaders to review Common Core aligned assessments and plan development of assessment of mathematics in 2015-16

Elementary Report Cards: Updated K-2 Elementary Report Cards to align to the Common Core State Standards including the update of teacher and family guides (in English and Spanish) for use with the Report Cards.

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

LCAP / District Indicator Evaluation: In addition to the LCAP Evaluator, the Director oversaw all quantitative and summative evaluation of LCAP Goals in alignment with BSEP, 2020 and District Goals to assure that there is a systematic Research, Evaluation and Assessment program.

**BERKELEY UNIFIED SCHOOL DISTRICT
 BERKELEY SCHOOLS EXCELLENCE PROGRAM (BSEP)
 EVALUATION (Measure A, Resource 0856)
 Revenue and Expenditures
 Comparison Report FY 2014/15**

Purpose

Nine percent (9%) of the available revenues *shall be dedicated to providing professional development for the District's teachers and staff, to assessing the effectiveness of the District's educational programs for improving student achievement, and to providing and maintaining computers and technology in schools.*

Budget Managers: Pasquale Scuderi, Assistant Superintendent for Educational Services
 Debbi D'Angelo, Director of Evaluation and Assessment

	Audited Actuals 2013/14 As of 6/30/14	Adopted Budget 2014/15 As of 7/1/14	2nd Interim Budget 2014/15 As of 1/31/15	Unaudited Actuals 2014/15 As of 6/30/15	2nd Interim Budget vs. Unaudited Actuals 2014/15
REVENUE	610,325	611,808	615,463	615,035	(428)
EXPENDITURES					
Certificated Salaries	294,089	320,788	322,838	322,522	(316)
Classified Monthly Support Salaries	83,649	90,312	93,311	93,493	182
Employee Benefits	94,484	102,853	95,789	90,482	(5,307)
Books & Supplies	2,095	9,000	9,000	2,959	(6,041)
Equipment	1,137	0	0	0	0
Unallocated Reserve	0	7,047	9,062	0	(9,062)
Services & Other Operating Expenses	62,682	76,000	76,000	65,161	(10,839)
Indirect Costs	36,217	43,753	43,753	41,487	(2,266)
TOTAL EXPENDITURES	574,353	649,753	649,753	616,104	(33,649)
NET INCREASE (DECREASE)	35,972	(37,945)	(34,290)	(1,069)	33,221
FUND BALANCE ANALYSIS					
Beginning Fund Balance	78,842	114,814	114,814	114,814	0
Net Increase (Decrease) in Fund Balance	35,972	(37,945)	(34,290)	(1,069)	33,221
Ending Fund Balance	114,814	76,869	80,524	113,745	33,221

STATUS REPORT

Highlights from the 2014-15 Year:

- Toolbox Training for Families of Color
- Partnered with district departments and community groups:
 - Children’s book author visit from Andrea Pinkney - BUSD Library Services.
 - Special Education Summit - Partnered with parent group, Parents of Children of African Descent.
 - Immigration Workshop March 2015 - Partnered with a community organization
 - Keeping our kids safe with technology workshop May 2015 - Partnered with BUSD Technology Services
 - Black Lives Matter Community Forum - Partnered with BUSD Student Services
- Strengthened ELACs and DELAC in partnership with Educational Services
- Coordinated Summer Resource Fair

OFEE Site Coordinators documented their contacts with 800 families, and made more than two thousand connections during the 2014-15 school year. The team focused on the target population of underserved families. Ongoing themes and needs included attendance, engaging families in their children’s education, and supporting guardians in meetings with school staff. There was a need for a high level of social work to find emergency shelters, food, low income housing, emotional support, special education advocacy, academic engagement and behavioral interventions.

OFEE’s model of Family Engagement is consistent with the Dual Capacity Building Framework developed by Karen Mapp in collaboration with Harvard University. We are building the capacity of staff and families to support the academic and socio-emotional advancement of students from our target families. To build capacity of our staff, we have hired a consultant to develop Equity Teacher Leaders that represent every school site in BUSD. These leaders work with the staff at their sites using tool gained from bi-monthly training.

OFEE Site Coordinators are tasked with case managing target families based on chronic absenteeism and academic performance. Site Coordinators require case management training and workshops on accessing resources such as emergency shelters, permanent housing, food, clothing and other support that our families need. Need for these resources are commonly associated with chronic absenteeism.

Building the capacity of parents is a requirement to the success of our students, therefore we are investing in training parents of our target groups to lead and advocate for their children. Parent/Guardian Leadership & Advocacy Trainings will be added as a component of this resource to further this capacity.

BERKELEY UNIFIED SCHOOL DISTRICT
BERKELEY SCHOOLS EXCELLENCE PROGRAM (BSEP)
PARENT OUTREACH (Measure A, Resource 0857)
Revenue and Expenditures
Comparison Report FY 2014/15

Purpose

One and a quarter percent (1.25%) of the revenues dedicated to the Programs to Enhance Student Learning *shall be allocated annually for a variety of services to support the families of Berkeley's public school students by providing parent education and promoting greater parent involvement in their children's education.*

Budget Manager: Pat Saddler, Director of Special Projects and Programs
Charity DaMarto, Supervisor of Family Engagement and Equity

	Audited	Adopted	2nd	Unaudited	2nd
	Actuals	Budget	Interim	Actuals	Interim
	2013/14	2014/15	2014/15	2014/15	Budget
	As of	As of	As of	As of	vs.
	6/30/14	7/1/14	1/31/15	6/30/15	Unaudited
					Actuals
					2014/15
REVENUE	302,776	303,476	305,289	304,894	(395)
EXPENDITURES					
Staff	198,319	246,863	236,941	246,375	9,434
Employee Benefits	61,761	69,869	71,060	78,624	7,564
Books & Supplies	3,113	8,000	8,000	4,850	(3,150)
Equipment	0	0	6,783	6,685	(98)
Unallocated Reserve	0	3,409	5,635	0	(5,635)
Services & Other Operating Expenses	34,481	30,000	31,535	16,673	(14,862)
Indirect Costs	20,033	27,689	27,689	25,502	(2,187)
TOTAL EXPENDITURES	317,707	385,830	387,643	378,709	(8,934)
NET INCREASE (DECREASE)	(14,931)	(82,354)	(82,354)	(73,815)	8,539
FUND BALANCE ANALYSIS					
Beginning Fund Balance	318,462	303,531	303,531	303,531	0
Net Increase (Decrease) in Fund Balance	(14,931)	(82,354)	(82,354)	(73,815)	8,539
Ending Fund Balance	303,531	221,177	221,177	229,716	8,539

SCHOOL LIBRARIES
(BSEP Measure A, Resource 0860)

OVERVIEW for FY 2014-15

Purpose

Provide student access to quality school libraries, which shall be maintained by providing library staff to operate the District's K-12 school and other specialized libraries, and by allocating revenues for books, materials, services and equipment for the school libraries.¹

Budget Managers: Pasquale Scuderi, Assistant Superintendent for Educational Services
Becca Todd, District Library Coordinator

Certificated Salaries

<i>Budget: \$566,135</i>	<i>Actual: \$563,722</i>	<i>Variance: (\$2,413)</i>
● 3 Middle School Teacher Librarians	3.0 FTE	
● 2 High School Teacher Librarians	2.0 FTE	
● Continuation High School Librarian	0.6 FTE	
● TSA Elementary Teacher Librarian	0.5 FTE	
● District Library Coordinator	1.0 FTE	

Classified Salaries

<i>Budget: \$514,008</i>	<i>Actual: \$515,981</i>	<i>Variance: \$1,973</i>
● 11 Elementary Library Media Technicians	9.5 FTE	
● 3 Middle School Library Media Technicians	1.86 FTE	
● Central Media Library Technician	0.8 FTE	
● High School Library Media/Textbook Technician	0.8 FTE	

Employee Benefits

<i>Budget: \$392,020</i>	<i>Actual: \$364,055</i>	<i>Variance: (27,965)</i>
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Books and Supplies

<i>Budget: \$194,450</i>	<i>Actual: \$170,257</i>	<i>Variance: (24,193)</i>
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Services and Other Operating Expenses

<i>Budget: \$64,198</i>	<i>Actual: \$63,837</i>	<i>Variance: (\$361)</i>
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Indirect Costs

<i>Budget: \$127,848</i>	<i>Actual: \$121,141</i>	<i>Variance: (\$6,707)</i>
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Fund Balance

<i>Beginning: \$522,428</i>	<i>Ending: \$491,881</i>	<i>Decrease: \$30,547</i>
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¹ BSEP Measure A, Section 3.B.ii.

RESOURCE SUMMARY

There was some variation in expense due to some staff benefit choices shifting to “cash in lieu”. The fact that the classification and compensation study has yet to be implemented meant that funds set aside for that purpose for classified salaries, were not expended. Funding from a prior BSEP Measure (Fund 8) was available to provide for the Worldbook subscription. These savings and the prior fund balance allowed for planning toward a district-level TSA for 2015-16.

STATUS REPORT

BSEP funds provide the backbone for library staffing and resources throughout the Berkeley school system, with a core mission of addressing every student’s academic and independent reading needs with a wide range of books, online resources and integrated programming. The library lens of the 2020 Vision focuses commitment on developing skilled thinkers and learners throughout the entire Berkeley school community with continual mindfulness about diversity in characters, themes, authors and illustrators. Following are highlights from FY 2014-15.

Solid support for a culture of reading

Our BUSD libraries promote a strong reading culture with print and digital resources aligned to curricular assignments, as well as reader interest and initiative. Over 250,000 books circulated in the K-12 schools in 2014-15, a slight increase over the previous year. The continued allocation of \$15 per pupil for library books and materials allowed the program to address the broad range of reading levels and interests of students and staff. Some libraries periodically run book clubs or special reading initiatives such a Mock Newbery program.

Our preschoolers made good use of the Preschool Book Bag Lending Library at each our three child development centers. The Book Bag staff continued with consistent morning and afternoon hours, ensuring that all students had a weekly opportunity to hear an additional story and exchange a book for home reading.

The BEARS Summer School Library program continued in the summer of 2015, with a Library Media Technician at both BEARS/EDC summer school sites (this year at Malcolm X and Thousand Oaks) for fifteen hours per week at each site, a total of 30 hours per week for five weeks. This program supports the focus on literacy, helping mitigate against the common “summer slide.”

Our third year of familiarity with our Destiny library management system allowed us to handle our robust print circulation and incorporation of ebooks and audiobooks.

Library Staff

During the 2014-5 school year new library media technicians were welcomed at Emerson (part time), Oxford, Berkeley High School and the Central Media Library, and Longfellow’s previous Library Media Tech returned as a fully credentialed Teacher Librarian! The Elementary Teacher Librarian on Special Assignment (TSA) developed leveled book lists that were used in all elementary classrooms, and worked more closely with the Literacy Coaches to help them incorporate digital resources in alignment with library standards and the Teachers College Reading and Writing Project (TCRWP) scope and sequence. Many site library staff serve on

school committees, and a number are recognized leaders in the school library field, serving on regional and national boards and presenting at conferences. All are dedicated to serving our 9,500+ students and families with a hearty embrace of reading and learning across the disciplines, with a reasonable dose of technology to boot.

Visiting Authors and Illustrators

We were particularly lively in our hosting of authors and illustrators of many cultures and ethnicities. Kwame Alexander (via Skype), Mac Barnett and Jory John, Gennifer Choldenko, Angela Dominguez, Jacqueline Briggs Martin, Mitali Perkins, Andrea Davis Pinkney, Jean Reagan, Pam Muñoz Ryan, Kate Schatz and Miriam Klein Stahl, Liesl Shurtliff, Duncan Tonatiuh, and Rita Garcia Williams shared inspiring words of wisdom with our students, staff and in some instances whole family events.

Technology

The District Library Coordinator, in conjunction with the Director of Technology, continued to facilitate the Instructional Technology Department, also known as DigiTech. Supporting classroom teachers to integrate more technology with model lessons using Chromebooks, launching the Tech Teacher Leader team K-12, and coordinating the summer DigiTech Institute with the Instructional Technology TSAs as a culmination of the Strategic Impact Grant, brought increased awareness, engagement, frustration and discovery - and skills - into classrooms throughout the district. Internet capacity issues plagued most sites throughout the year, yet the intention to persevere in a balanced approach to the use of technology remains strong.

Every library has a small to medium bank of computers for student and staff use, and the library catalog is entirely online. At the elementary level, upper grade students are often introduced to their Typing Club accounts in the library, then supported in the classroom and during recess visits. Library-based initiatives such as Tuesday Twist and Thursday Shuffle provide opportunities to integrate small group sessions with new digital tools. The middle school libraries coordinate their Mouse Squad teams, fostering skills in digital media and technology. Students develop online research skills utilizing our districtwide subscription to World Book Online; the middle schools also have a subscription to Teen Health and Wellness; the high schools have additional subscriptions to ABC-Clio, Gale Virtual Reference, Opposing Viewpoints, and ProQuest. Each library webpage provides direct links to these useful resources and as well as other appropriate resources on the open web. Digital citizenship and cyber safety skills are addressed when guiding students to use online resources.

Community Collaboration

Our libraries host many events beyond the hundreds of student visits every week. We display student art and science projects; provide space for music classes and vision screening; host meetings for staff, PTA, ELAC, SGC; support the Rotary Club's third grade Dictionary Distribution; and actively collaborate with the Berkeley Public Library.

**BERKELEY UNIFIED SCHOOL DISTRICT
 BERKELEY SCHOOLS EXCELLENCE PROGRAM (BSEP)
 LIBRARY PROGRAM (Measure A, Resource 0860)
 Revenue and Expenditures
 Comparison Report FY 2014/15**

Purpose

Seven and a quarter percent (7.25%) of revenues dedicated to the Programs to Enhance Student Learning *shall be allocated annually to provide student access to quality school libraries which shall be maintained by providing library staff to operate the District's K-12 school and other specialized libraries, and by allocating revenues for books, materials, services and equipment for the school libraries.*

Budget Manager: Pasquale Scuderi, Assistant Superintendent for Educational Services
 Becca Todd, District Library Coordinator

	Audited Actuals 2013/14 As of 6/30/14	Adopted Budget 2014/15 As of 7/1/14	2nd Interim Budget 2014/15 As of 1/31/15	Unaudited Actuals 2014/15 As of 6/30/15	2nd Interim Budget vs. Unaudited Actuals 2014/15
REVENUE	1,755,939	1,760,163	1,770,679	1,768,444	(2,235)
EXPENDITURES					
Certificated Salaries	587,000	561,602	566,135	563,722	(2,413)
Classified Salaries	472,272	512,553	514,008	515,981	1,973
Employee Benefits	372,712	395,912	392,020	364,055	(27,965)
Books & Supplies	155,980	163,375	169,450	163,102	(6,348)
Equipment	16,322	25,000	25,000	7,155	(17,845)
Unallocated Reserve	0	53,035	39,939	0	(39,939)
Services & Other Operating Expenses	55,296	59,273	64,198	63,837	(361)
Indirect Costs	111,690	127,848	127,848	121,141	(6,707)
TOTAL EXPENDITURES	1,771,272	1,898,598	1,898,598	1,798,992	(99,606)
NET INCREASE (DECREASE)	(15,334)	(138,435)	(127,919)	(30,548)	97,371
FUND BALANCE ANALYSIS					
Beginning Fund Balance	537,763	522,429	522,429	522,429	0
Net Increase (Decrease) in Fund Balance	(15,334)	(138,435)	(127,919)	(30,548)	97,371
Ending Fund Balance	522,429	383,994	394,510	491,881	97,371

INSTRUCTIONAL TECHNOLOGY
(BSEP Measure A, Resource 0862)
OVERVIEW: FY 2014-15

Purpose

Providing and maintaining computers and technology in schools.¹

Budget Manager: Jay Nitschke, Director of Technology

Certificated Salaries & Stipends

<i>Budget: \$57,766</i>	<i>Actual: \$52,046</i>	<i>Variance: (\$5,720)</i>
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- TSA for Instructional Technology
0.50 FTE²
- Tech Teacher Leader Stipends

Classified Salaries

<i>Budget: \$428,228</i>	<i>Actual: \$428,440</i>	<i>Variance: \$212</i>
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- Computer Technicians
6.2 FTE
- Student Systems Specialist
0.6 FTE³
- Director of Technology
0.2 FTE⁴

Employee Benefits

<i>Budget: \$199,887</i>	<i>Actual: \$198,537</i>	<i>Variance: (\$1,350)</i>
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Materials and Supplies

<i>Budget: \$70,000</i>	<i>Actual: \$54,110</i>	<i>Variance: (\$15,890)</i>
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Equipment

<i>Budget: 27,978</i>	<i>Actual: \$24,979</i>	<i>Variance (\$2,999)</i>
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Services and Other Operating Expenses

<i>Budget: \$30,000</i>	<i>Actual: \$3,264</i>	<i>Variance: (\$26,736)</i>
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Indirect Costs

<i>Budget: \$57,732</i>	<i>Actual: \$54,971</i>	<i>Variance: (\$2,761)</i>
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¹ BSEP Measure A, Section 3C

² Multi-funded: BSEP PD 0.5

³ The General fund provides 0.4 FTE for a total 1.0 FTE

⁴ The General fund provides 0.8 FTE for a total 1.0 FTE

Fund Balance*Beginning: \$93,719**Ending: 67,658**Decrease: \$26,061***RESOURCE SUMMARY**

Currently, the amount of money available for technology is quite low (~\$8/student). The cost of staffing support for technology requires most of the BSEP resource. Fortunately, there have been additional one-time funds that have provided Chromebooks (FY13-14, 14-15), LCD projectors, and document cameras (14-15). However, leading up to the new BSEP measure, the amount allocated to technology needs will need to be re-examined to keep up with the demands for infrastructure, equipment, staffing and professional development.

STATUS REPORT

Technology in the hands of teachers and students is critical to teaching and learning and meeting district instructional goals. BSEP funds are the only funds that provide schools with staff to keep technology working. Technicians' tasks include supporting teachers and staff by keeping computers and other technology up-to-date and operational, to help integrate technology with the curriculum, to support teachers in using PowerSchool and Illuminate, and to help technology committees and School Governance Councils make decisions about technology needs and purchases. In 2014-15, tech staffing continued from 2013-14, with a few small exceptions.

Until the passage of the Measure I facilities bond in November 2010, there were no district monies outside of BSEP for the purchase of network infrastructure and other technology. Measure I has provided funds for installing wireless throughout the district. Currently, Measure I provides \$250,000 per year to improve district tech infrastructure. In 2014-15, the majority of that money was used to expand the wifi network.

The district working group known as DigiTech continued to meld Technology staff, Library staff, and the Instructional Tech Teachers on Special Assignment (TSAs) to focus on integrating technology into the regular school day through using technology.

From the BSEP Technology budget perspective, the funding of stipends for Tech Teacher Leaders (TTLs) at each school starting in second semester was the largest change in the Technology program in 2014-15. One teacher from each K-8 school and a group of three from the high schools met monthly with the DigiTech team and worked at their sites to improve the use of technology in classrooms.

Digitech and TTLs, in concert with school techs provided by BSEP, significantly furthered the use of technology in classrooms as well as provided the means for the district to perform well on the the SBA (Smarter Balanced Assessments) in all classrooms grades 3-8 and grade 11 at BHS and BTA.

**BERKELEY UNIFIED SCHOOL DISTRICT
 BERKELEY SCHOOLS EXCELLENCE PROGRAM (BSEP)
 TECHNOLOGY (Measure A, Resource 0862)
 Revenue and Expenditures
 Comparison Report FY 2014/15**

Purpose

Nine percent (9%) of the available revenues *shall be dedicated to providing professional development for the District's teachers and staff, to assessing the effectiveness of the District's educational programs for improving student achievement, and to providing and maintaining computers and technology in schools.*

Budget Manager: Jay Nitschke, Director of Technology

	Audited Actuals 2013/14 as of 6/30/14	Adopted Budget 2014/15 As of 7/1/14	2nd Interim Budget 2014/15 As of 1/31/15	Unaudited Actuals 2014/15 As of 6/30/15	2nd Interim Budget vs. Unaudited Actuals 2014/15
REVENUE	784,703	786,611	791,281	790,286	(995)
EXPENDITURES					
Certificated Monthly Support Staff	26,253	42,432	57,766	52,046	(5,720)
Classified Monthly Support Staff	395,231	409,653	428,228	428,440	212
Employee Benefits	181,899	192,417	199,887	198,537	(1,350)
Materials & Supplies	62,840	50,000	70,000	54,110	(15,890)
Unallocated Reserve	0	14,334	3,000	0	(3,000)
Equipment	16,861	20,000	27,978	24,979	(2,999)
Services & Other Operating Expenses	0	30,000	30,000	3,264	(26,736)
Indirect Costs	45,971	54,788	57,732	54,971	(2,761)
TOTAL EXPENDITURES	729,054	813,624	874,591	816,347	(58,244)
NET INCREASE (DECREASE)	55,649	(27,013)	(83,310)	(26,061)	57,249
FUND BALANCE ANALYSIS					
Beginning Fund Balance	38,070	93,719	93,719	93,719	0
Net Increase (Decrease) in Fund Balance	55,649	(27,013)	(83,310)	(26,061)	57,249
Ending Fund Balance	93,719	66,706	10,409	67,658	57,249

Appendix to BSEP Annual Report

FY 2014/15

BSEP Funds 5, 6, 7, 8

Budget Manager: Natasha Beery, Director of BSEP and Community Relations

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

Carryover funds were available for expenditure in FY 2014/15. There was no new revenue, other than a small amount of interest income and no reductions in prior year revenue from “Teeter Plan” adjustments from the County Tax Collection Office. During FY 2014/15, expenses were transferred from Funds 2 and Fund 4, to use the remaining funds. A financial summary for each Fund is attached and explained as follows:

BSEP Fund 5(BSEP Site Enrichment and BSEP Implementation)

This fund had a beginning fund balance of \$11,455. Expenses for hourly and contract work for Public Information and the BSEP Planning and Oversight Committee were transferred from Fund 4 to use the balance of these funds. At year end, the fund balance was \$7.

BSEP Fund 6 (BSEP Books and Educational Materials)

This fund had a beginning balance of \$6,176. \$6,190 of expense for Chromebooks was transferred from the Fund 4 Technology Resource to Fund 6 to use the balance of the funds. The ending fund balance was \$4.

BSEP Fund 7 (BSEP Buildings and Grounds Improvement)

The beginning fund balance for Fund 7 totaled \$1,294. \$1,297 of expense for window replacement was transferred from Fund 2 (Measure H/Maintenance) to Fund 7. The ending fund balance was \$1.

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

\$6,073 of expense for online library reference material (and the indirect cost) was transferred from the Fund 4 Library Resource to Fund 8. The expenditure used the beginning fund balance of \$6,059 and interest income of \$18 and left an ending fund balance of \$4 from interest income recognized after the books were closed.

Financial Summary
Funds 05-08
Unaudited Actuals FY 2014/15

	<u>Fund 5 (a)</u>	<u>Fund 6 (a)</u>	<u>Fund 7 (a)</u>	<u>Fund 8 (b)</u>
Revenue	34	18	3	18
Expenditures				
Classified Salaries	6,851	0	0	0
Benefits	729	0	0	0
Materials & Supplies	0	6,190	0	0
Contracted Services	3,902		1,297	5,664
Indirect Costs	0	0	0	409
Total Expenditures	11,482	6,190	1,297	6,073
Net Increase/Decrease	(11,448)	(6,172)	(1,294)	(6,055)
Beginning Fund Balance	11,455	6,176	1,294	6,059
Net Increase/Decrease	(11,448)	(6,172)	(1,294)	(6,055)
Ending Fund Balance	7	4	0	4

(a) BSEP Measure B of 1994

(b) Measure B of 2004