

BERKELEY UNIFIED SCHOOL DISTRICT

TO: Board of Education
FROM: Donald Evans, Ed.D., Superintendent
Natasha Beery, Director of BSEP and Community Relations
DATE: April 20, 2016
SUBJECT: BSEP Measure Renewal of 2016: First Draft

BACKGROUND INFORMATION

The local tax known as the Berkeley Schools Excellence Program (BSEP) has made a significant difference in the quality of our schools and the fiscal stability of our district since 1986. Thanks to BSEP, our students benefit from small class sizes, school libraries, music programs, instructional technology, before and after-school classes, and many other essentials for educational excellence.

The current measure, the Berkeley Public Schools Educational Excellence Act of 2006 (Measure A) is up for renewal by ballot on November 8, 2016. For the past two years, we have been engaged in an intensive process of preparation for the measure renewal, including public workshops, stakeholder and focus groups, voter polls, budget workgroups and educational priority papers. The Board has been provided with detailed process reports and updates on March 12, 2014, November 14, 2014, January 28, 2015, June 3, 2015, September 30, 2015, November 18, 2015, January 23, 2016 and April 6, 2016.

Planning Process Overview

Workshops and Educational Priorities: Over the past year, we have held dozens of meetings, workshops, and community meetings to discuss BSEP, with additional meetings still scheduled to share the Measure draft into early May. There have been wide-ranging conversations, and general agreement that the programs funded by BSEP are central to excellence in our schools. There were many discussions about strengthening, expanding and adapting BSEP programs to further improve opportunities for our students.

These public discussions are being summarized, and a detailed report of input will be provided in May. In the meantime, there are three papers examining the key elements and issues related to BSEP educational programs as presented in prior board documents, posted on:

<http://www.berkeleyschools.net/departments/bsep/forums-presentations>

Voter Poll: As reported in prior board updates, extensive polling found that Berkeley voters strongly agree that the local funding for schools has made a difference in the quality of education, are proud of providing this support, and are likely to renew the measure, recognizing the value of the programs funded by the current measure as well as the devastation that would be caused by the loss of the BSEP resource. At the same time, the support cannot be taken for

granted; the BSEP measure renewal must be both responsive to educational needs and an effective, equitable and sustainable investment of public funds.

Budget Models: As the community conversations progressed over the past year, a fiscal workgroup engaged in examining the implications of various program modifications, while incorporating numerous variables to create multi-year scenarios for a balanced budget. There have been many changes in the state funding landscape since the last measure, some positive and some negative, which have important impacts for the school district budget. Prior reports have detailed the most significant issues, including:

- School districts may no longer structure special taxes with different rates for commercial and residential properties;
- State-mandated increased employee benefit contributions;
- Changes in the state class-size reduction fund parameters.

These factors, coupled with the low cost-of-living increases to the BSEP tax rate over the past few years, have already lead to budget reductions in many BSEP programs. Budget projections for the new measure are all headed further into negative territory without additional adjustments to expenses and/or increases to revenues. The workgroup constructed numerous models which took into account the most significant expenses, including the class size reduction component, as well as options for reallocation of costs, and for adjustment in the tax rate to make the programs whole.

Proposed Framework for 2016 Measure Renewal

The following proposal outlines the manner in which the BSEP tax measure of 2016 can sustain the critical mission of the Berkeley Public Schools: to enable and inspire our diverse student body to achieve academic excellence and make positive contributions to our world.

The BSEP Measure of 2016 is organized into three key sections, to better clarify the major purposes of the measure. These elements and allocations are:

1. **High Quality Instruction:** Small Class Sizes, Professional Development, Classroom Support, Program Evaluation, and Expanded Course Offerings
2. **Essentials for Excellence:** School Libraries; Music, Visual and Performing Arts; School Site Programs; and Instructional Technology
3. **Effective Student Support:** Counseling and Behavioral Health; Family Engagement and Access; and Student Achievement Strategies

1. High Quality Instruction.....66%

The measure renewal continues the Berkeley commitment to small class sizes, while ensuring that class sizes are implemented in a sustainable model for our elementary schools. The framework also unites the foundation of small class sizes with key supports for teaching, including professional development, classroom support, educational program evaluation, and expanded course offerings.

- a. **Small Class Sizes:** Elementary School classes would be balanced at a school-wide average of 23:1 across K-5 grades. Secondary Schools (grades 6-12) would be balanced at a 28:1 district-wide average for each grade.

The first BSEP measure of 1986 reduced class sizes to 26:1 in the elementary grades and 28:1 in the secondary schools. In 1996, when State funds became available to provide financial incentives for districts to reduce class sizes in K-3 at 20.44 to 1, our district was one of the few to begin to meet that goal, thanks to BSEP funds. However, the imbalance of 20:1 in K-3 and 26:1 at 4th/5th grades has proved logistically challenging, as Berkeley schools are small, with many schools having cohorts of 3 classrooms per grade. This has led to a choice of taking 60 students in 3rd grade and either putting them in combination grade (3rd/4th or 4th/5th) classrooms in order to meet the target of 26 students, or making the local decision to waive the 26 target at some schools and have two classes of 30 or more.

Two years ago, the State changed the K-3 class size reduction fund goal to 24:1, and also reduced the funding targeted to that goal. The question has been raised as to whether reducing class sizes is the most effective use of funds, and research on the issue has been mixed, with the key study pointing toward significant effects when class sizes were reduced toward 13 to 17 students. However, in Berkeley, both small school sizes and small class sizes remain an important community value. Class size is seen as one of the key ingredients for ensuring high quality, individualized instruction.

For the Measure renewal, by setting our goal to achieve class sizes at a 23:1 average across all elementary grades, not just K-3, Berkeley class sizes will continue to be below local and state averages, and significantly so in some grades. Balancing class size across K-5 has the following benefits:

- Eliminates the logistical issues with the 3rd to 4th grade jump in size,
- Reduces class sizes for the upper elementary grades,
- Returns a number of “flex” rooms to school use, and
- Is a more fiscally sustainable model.

- b. **Support for Teaching:** After the primary purpose of providing small class sizes has been met, funds may be used for purposes that are related to the overall goal of high quality instruction. This recognizes that class size is a

necessary, but not sufficient component of meeting the needs of a wide range of students. This resource is structured to provide additional supports for teaching, including professional development, as well as providing student achievement and program data to inform instruction, expanded course offerings to supplement the school day, and classroom support as funds permit.

The BSEP Planning and Oversight (P&O) Committee must review staff proposals for the use of these funds and recommend allocations on a yearly basis to the Board. Some of this programs are currently being funded by BSEP through separate resources, and include:

- **Professional Development** - BSEP currently provides the funds for a professional development coordinator for the district, ensuring that programs and processes are consistently aligned with high priority goals. The BSEP funds also contribute significantly to numerous efforts for improving teaching and learning, including providing literacy coaching at all three levels in the K-12 system, building a teacher-led and teacher-run structure for professional learning at Berkeley High School, and supporting the ongoing development of instructional technology for classroom usage. Additionally, BSEP investments are developing and funding teacher leadership at the K-5 level in mathematics, English language arts, science, and elsewhere providing resources for teachers to discuss and work collaboratively on issues of equity and race and their impact on the classroom.
- **Classroom Support** - If funding is available, additional staffing or program support may be provided to support teachers in meeting the needs of a wide range of students.
- **Educational Program Evaluation** -This function was added to the Measure of 2006 to offer staff development and technical support to teachers in the use of data, as well as provide data to Site Councils, the Board, and other stakeholders in order to examine educational outcomes and measures of student performance across schools and programs. The analytical services also ensure that formative assessments and curricular projects developed by teacher teams can support results-oriented teaching strategies.
- **Expanded Course Offerings** - Funds for expanded course offerings, or “ECO” funds, provide additional classes that take place before or after the school day. These classes contribute to a wider set of offerings each year in our secondary schools that include additional laboratory experience in science, academic support classes, music, theatre and dance classes, as well as yearbook staffing and journalism.

2. Essentials for Excellence27%

Intellectual and creative growth becomes a more achievable goal when the resource of small class size connects to thoughtfully designed curriculum delivered by teachers who are skilled and creative facilitators, and where those classes are provided with access to high quality libraries, appropriate technologies, and learning experiences such as music, arts, and science. In the Berkeley Public Schools, we value music, libraries, the arts, technology, and the numerous other endeavors often labeled as “extras” or “extracurricular.” These programs are seen as essentials, and warrant a prominent place in the daily educational experiences of our students. BSEP provides crucial funding for programs that provide equitable access to an enriched, challenging and engaging curriculum. With the Measure renewal, these funds would support:

- a. School Site Programs:** 10.25% of revenues would continue to be allocated annually to each preK-12 school on a per pupil basis. The allocation of these funds should be a part of each School Site Council’s deliberations as they develop the school or WASC plan. The Site Council must develop recommendations to allocate these revenues for the personnel, services and materials required to deliver effective and equitable opportunities for student engagement, enrichment, and achievement. These funds may be spent to deliver such programs as arts and science instruction, tutoring, athletics and student activities, and before and after school programs.

- b. School Libraries:** 6.25% of revenues would continue to provide student access to quality school libraries in all the District’s K-12 schools. Our library educators encourage the pleasures of reading with kids and also collaborate with teachers to ensure that resources are aligned with curricular needs. Our school libraries are in high use, with 1,000 books checked out per day, and a diverse collection which provides students with “mirrors and windows” into their own experiences and those of the larger world. Our library collections are now fully online and accessible from any computer, and include print and digital content, e-books, as well as research databases at the secondary level. Our school librarians are skilled professionals who turn the physical library space into an increasingly interactive and collaborative hub for students, while also preserving the role of the library as a quiet space on campus and in the school community for students to unplug, focus, and imagine.

- c. Music and Visual and Performing Arts Programs (VAPA):** 7.25% of revenues would continue to provide quality instructional programs in music and the visual and performing arts for elementary and middle school students. Our district continues to be recognized for the strong community support for musical education; BSEP has allowed our schools to restore and maintain arts and music programs that have been eliminated in districts which lack the public resources or the vision to go beyond narrower

opportunities for students. While our schools sustain our investment in the arts in the coming years, we must continue to broaden both the cultural diversity of our arts programs and expand access to the arts at all levels of our K-12 progression. There has been considerable growth in participation in the middle school music program, and there are opportunities for students to participate in a widening range of options, including chorus and mariachi, alongside jazz and orchestra.

- d. **Instructional Technology:** 3.25% of revenues would be allocated to providing instructional technology and access for students to computers and technology in schools. The increasing presence of technology in the classroom presents educators with expanded instructional opportunities, while also providing students with new options to engage with subject matter and demonstrate proficiency or mastery of that content. The current measure provides support for computer technicians who support classroom technology, as well as a small amount for materials at schools. Berkeley’s public schools continue to increasingly integrate technology into our classrooms in order for teachers and students to take full advantage of tools that support creative teaching and enhance learning.

3. Student Support.....7%

In addition to providing essential resources for our educational programs, our community has made it clear, both through our voter poll and stakeholder meetings, that there is a strong desire to invest in providing additional supports and services for our students and families. The Middle School Counseling and Family Engagement purposes of the 2006 measure have been moved out of disparate BSEP resources and, together with the “Student Achievement Strategies” purpose, now form a coalition of resources which can be directed towards providing effective supports that help students reach their highest academic potential, while addressing the needs of the whole child. These revenues may be allocated in flexible proportions within this allocation to programs for Counseling and Behavioral Health; Family Engagement and Access; and Student Achievement Strategies in order to improve academic, behavioral and social-emotional outcomes for students.

- **Counseling and Behavioral Health:** This resource currently provides two middle school counselors at Willard, two at Longfellow, and three at King. The counselors support students’ academic success and social and emotional well-being, and also facilitate greater parent access to school and community resources. Counselors are often part of interdisciplinary team efforts to address student needs and educational goals, and can provide consultation and specific insights on student needs to their teacher colleagues. Whereas the prior measure had only specified middle school counselors, this resource has been renamed with a broader title to

incorporate the possibility of additional types of academic, social-emotional and behavioral support, should funding permit.

- **Family Engagement and Access Services:** Berkeley Public Schools' model of family engagement recognizes the crucial role of parents and extended family members in the development and progress of children in our schools. Currently BSEP and LCAP funds are providing the equivalent of eight full-time employees who work to support all families, making a pointed effort to engage those who have been less visible in the school community, most notably lower income families, families of English learners, and families of color.
- **Student Achievement Strategies:** In addition to the supports provided by counseling and family engagement staff, there are academic and behavioral supports and interventions currently provided by BSEP that could be gathered into this flexible resource to support student achievement. The new Local Control and Accountability Plan brings with it resources, metrics, and a focus on high-need students which also could assist in informing the ways in which BSEP could direct additional resources toward supporting students both when they struggle and when they are ready to achieve at higher levels or in new domains. The allocation for this portion is currently modeled on some of the "program support" elements in the prior measure - those which link to improved student achievement. This includes staffing for the Response to Intervention and Instruction program (RtI) program, which functions as a comprehensive way of tailoring education to meet all students' needs, using data to make decisions about student learning; Literacy Coaches for elementary schools, and grade-level support for our Two-Way Immersion classrooms.

Flexibility: Since conditions and programs will doubtlessly evolve during the eight year period of the proposed measure, we recommend that the Measure include the flexibility to shift funds among certain programs, as was permitted in the prior measure. In this case, up to 10% of revenue allocations could be redirected from any of the district-wide programs (Libraries, Music and VAPA, Technology, Student Support) and distributed to another of these programs in any given year. This flexibility would then allow, as an example, a significant purchase of computers or musical instruments in a year in which the libraries have other sources of funds to upgrade the collection, or additional funds for student support to be obtained in a year when the music program staffing and instruments is meeting the essential program needs. These reallocations would be reviewed by the BSEP Planning and Oversight Committee and approved by the Board.

Measure Oversight, Communication and Translation

The proposed Measure structure continues the practice of including a small portion of the revenues (2%), before the remainder is distributed to the other purposes, to support the oversight of the measure, including staff support for the BSEP Planning and Oversight Committee and School Site Committees, as well as funding for communication, translation, and community engagement, to ensure that the public is informed about district programs and engaged in decision-making and oversight.

Additional Considerations

The wide range of input from our workshops and stakeholder conversations has been documented by our note taking for each meeting; a full summary will be provided by the May 18 Board meeting. Below are listed just a few of the issues, concerns and suggestions that may be beyond the scope of the current BSEP proposal to directly address. Some were voiced as significant community concerns and will doubtless come to the attention of the Board over the course of the BSEP, LCAP, and other resource discussions:

- Family Resource Center / Teacher Resource Center
- Gardening and Cooking
- Health, Wellness, Athletics
- High School Redesign
- Longer Library Hours
- Longer School Day / Longer School Year
- Mental Health Staffing
- Mentoring Programs
- More Instructional Assistants in Classrooms
- More Career-Technical Options
- More Options for Arts and Performing Arts
- Programs/Resources for African-American/Black Students
- Saturday and/or Summer School
- Special Education / Full Inclusion Staffing Ratios
- Universal Preschool or other Pre-K supports

Given the necessity of increasing the tax rate simply to meet such exigencies as the new “uniform” tax rate rules and the state-mandated increased employee benefit contributions, it did not seem possible to commit to adding further major purposes to the measure beyond the restructuring already proposed.

With careful consideration of the public input, educational priorities, and budgetary models, we are recommending that the School Board ask that Berkeley voters reaffirm the community commitment to providing a high quality education in the Berkeley Public Schools by renewing the BSEP Special Tax in 2016.

The overall allocation framework and the proposed text of the measure has been reviewed by the BSEP Planning and Oversight (P&O) Committee, who

have also reviewed the budgetary models, voter polls, public input, and program proposals over the past year. The draft of the proposed full text of the measure is attached as Appendix A for additional review and comment in order to more completely inform the discussions of the Measure renewal.

POLICY/CODE

By the California Constitution, Article XIII A, section 4 and Government Code section 50075 et seq., school districts are authorized, upon approval of 2/3rds of the electorate, to levy qualified special taxes on property in the District for the purposes of providing quality educational programs in the District and other lawful purposes of the District.

FISCAL IMPACT

If a tax is approved by the voters, revenue of approximately \$28 million per year would be available to support the identified programs, beginning in the 2017-18 fiscal year, and adjusting with an annual cost-of-living increase as calculated by the Bay Area Consumer Price Index (CPI) for each of the remaining years of the eight-year measure.

STAFF RECOMMENDATION

Discuss and consider the recommendations for renewal of the BSEP Special Tax Measure, with the anticipation of taking action on final language on May 18, 2016 and officially calling for a tax measure at the June 1, 2016 Board meeting.