

# BERKELEY UNIFIED SCHOOL DISTRICT

**TO:** Donald Evans, Ed.D.  
**FROM:** Natasha Beery, Director of BSEP and Community Relations;  
BSEP Planning and Oversight Committee  
**DATE:** January 28, 2015  
**SUBJECT:** Annual Report of Revenue and Expenditures in FY 2013-14 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.

The Planning and Oversight Committee has reviewed the Annual Report for FY 2013-14, and hereby provides this report to the Board of Education on the District's compliance with the conditions of this Measure.

All BSEP revenue from *Measure A of 2006* is deposited, monitored and expended through the BUSD accounting system (QSS) in 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 measure<sup>1</sup>.

The attached Annual Report displays the revenue and expenditures of each Resource of Fund 4 at the closing of Fiscal Year (FY) 2013-14, as well as a brief description of the status of projects funded through BSEP. Appendix A provides an overview of FY 2013-14 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 revenues<sup>2</sup> are allocated to the following purposes and deposited in restricted accounts.

0841	Class Size Reduction	66.00%
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<sup>1</sup> BSEP Measure A, Section 2.

<sup>2</sup> 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.

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% ( <i>shared</i>
0856	Program Evaluation	<i>by these three</i>
0862	Instructional Technology	<i>resources)</i>

**POLICY/CODE**

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

*Berkeley Public Schools Educational Excellence Act of 1994 (Measure B)*

**FISCAL IMPACT**

In FY 2013/14, BSEP Measure A of 2006 provided 20% of the District's combined General Fund revenue, in the amount of \$24,974,753. In addition, carryover funds from BSEP Measure B of 1994 accounted for \$126,887 in expenditures.

**STAFF RECOMMENDATION**

Review and accept the annual report of 2013-14 BSEP Revenue and Expenditures from Measure A of 2006, Fund 4; BSEP Measure B of 1994, Funds 5, 6 and 7; and Measure B of 2004, Fund 8.

## 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.<sup>1</sup>

### 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 measure<sup>2</sup>. 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 2012-13, compared to the FY 2013-14 budget (revised at second interim, January 31 2014), the (unaudited) actuals as of June 30, 2014, and the variance between the budget and actuals. This comparison report also shows a Fund Balance Analysis.

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

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

### Indirect Costs

Each BSEP resource is charged for Indirect Costs. The Indirect Cost rate in FY 2013/14 was 6.73% and is calculated by a formula determined by the State. The rate is applied to all expenses and transfers and totaled \$1,550,013. 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 \$13,101,094 to the General Fund. The transfers funded 132.34 FTE to reduce class sizes and 4.56 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 \$911,902 at the end of FY 2013/14 a reserve of 3.6%. In addition, there are Fund Balances for each resource, managed by the program supervisors and District administration.

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<sup>1</sup> BSEP Measure A, Section 5.C

<sup>2</sup> BSEP Measure A, Section 5.A

**BSEP/Measure A of 2006  
Revenue Allocation Summary  
FY 2013/14**

	Resource	%	Budget	(1) Calculated Actuals	(2) Unaudited Actuals as of 6/30/14	Variance
<b>Revenue</b>						
County Tax Collections			24,660,000	24,925,871		
City of Berkeley Tax Collections			200,000	257,989		
Rebates/Reduction in PY Receivable			(80,000)	(229,046)		
Interest			20,000	19,939		
<b>Total Projected Revenue</b>			<u>24,800,000</u>	<u>24,974,753</u>		
<b>Expenses</b>						
County Collection Fees			417,800	421,068		
City of Berkeley Fees			50,000	48,400		
Misc. Expense			0	0		
Audit and Legal Expense			6,000	5,280		
<b>Total Expenses</b>			<u>473,800</u>	<u>474,748</u>		
<b>Net Revenue</b>			24,326,200	24,500,005		
Reserve/Incremental Reserve			0	(6,529)		
<b>Net Revenue after Reserve</b>			<u>24,326,200</u>	<u>24,506,534</u>		
<b>Available for Allocation</b>			24,326,200	24,506,534		
Public Information/P&O	0854	2.00%	(486,524)	(490,131)		
<b>Net Available for Allocation</b>			<u>23,839,676</u>	<u>24,016,404</u>		
<b>Resource Allocation</b>						
			(a)		(b)	(b)-(a)
Class Size Reduction	0841	66.00%	15,734,186	15,850,827	15,851,160	116,974
Site Discretionary	0852	10.25%	2,443,567	2,461,681	2,461,733	18,167
Music/VAPA	0853	6.25%	1,489,980	1,501,025	1,501,057	11,077
Parent Outreach	0857	1.25%	297,996	300,205	300,211	2,215
Libraries	0860	7.25%	1,728,377	1,741,189	1,741,225	12,849
PD/Evaluation/Technology (9%)						
Prof. Development	0855	3.24%	772,406	778,131	779,148	6,742
Evaluation	0856	2.52%	600,760	605,213	605,226	4,466
Technology	0862	3.24%	772,406	778,131	778,148	5,742
<b>Net Resource Allocation</b>			<u>23,839,676</u>	<u>24,016,405</u>	<u>24,017,908</u>	<u>178,232</u>
Public Information/P&O	0854		486,524	490,131	490,141	3,617
<b>Total Allocation to All Resources</b>			<u>24,326,200</u>	<u>24,506,535</u>	<u>24,508,049</u>	<u>181,849</u>

(1) Calculated Actuals show how actual revenue would be distributed using the methodology used in the

(2) Unaudited Actuals reflect the actual revenue recorded in the books for each Resource.

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

**OVERVIEW: FY 2013-14**

**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  
Neil Smith, Assistant Superintendent for Educational Services**

**REVENUE TRANSFERS TO THE GENERAL FUND**

	<i>Budget</i>	<i>Actual</i>	<i>Variance</i>
<b>Teacher Compensation</b> (132.34 FTE)	(\$11,698,300)	(\$12,083,984)	(\$385,684)
<b>Substitute Compensation</b>	(\$225,800)	(\$224,581)	\$1,219
<b>Direct Support</b>	(\$381,100)	(\$380,081)	\$1,019

**EXPENDITURES**

	<i>Budget</i>	<i>Actual</i>	<i>Variance</i>
<b>Certificated Teacher Salaries</b>	\$1,995,727	\$1,681,608	(\$314,119)

At closing, half the expense for RTI teachers was transferred to the General Fund from BSEP Resource 0841. The transfer totaled \$492,692, equivalent to 5.5 FTE, and includes salaries and benefits. In FY 2012-13, the transfer was made directly to Special Education. In FY 2013-14, the transfer was made to the General Fund.

	<i>Budget</i>	<i>Actual</i>	<i>Variance</i>
<b>Certificated Counselor Salaries (4.8 FTE)</b>	\$371,510	\$380,892	\$9,382
<b>Employee Benefits</b>	\$658,499	\$549,207	(\$109,292)
<b>Indirect Costs</b>	\$1,030,791	\$1,029,713	(\$1,078)

	<i>Beginning</i>	<i>Net Increase/ (Decrease)</i>	<i>Ending</i>
<b>Fund Balance</b>	\$901,809	(\$345,369)	\$556,440

## **RESOURCE SUMMARY**

In May, a retroactive bonus of 1.5% was paid to certificated staff for FY 2013-14. The cost of this increase for staff directly charged to BSEP Class Size Reduction was \$98,694. The transfers to the General Fund from 0841 (CSR) were increased by the average teacher cost based on the bonus. This meant an increase of about \$311,300 to the CSR fund. The transfer of costs to the General Fund for part of the RTI expense also offset some of the planned deficit spending in this resource.

## **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 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 (BTA). 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 2013-14.

For 2013-14, BSEP Class Size Reduction (CSR) funds paid for 132.34 FTE for classroom teachers. This represents over 30% of the teaching staff in the district. The new Local Control Funding Formula began in FY 2013-14 and 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 \$2.6 million to \$1.9 million, with the difference of \$.7 million becoming part of the unallocated base grant.

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.”

In FY 2013-14, there were sufficient funds to meet the class size reduction goals stipulated in the BSEP Measure, and provide 28.8 FTE for Middle School Counseling, teachers for Expanded Course Offerings (ECO) and staff for Program Support. These expenses were charged directly to the BSEP Resource 0841. In FY 2013-14, these funds provided for:

• Middle School Counselors	4.80 FTE
• BHS Expanded Course Offerings	6.40 FTE
• Middle School Expanded Course Offerings	1.60 FTE
• Elementary Literacy Coaches	3.30 FTE
• 3/4/5 TWI Combination Classes (3 Schools)	1.80 FTE
• BHS Math Teachers (lower class size)	2.00 FTE
• Middle School Math Teachers	3.40 FTE
• Elementary RTI Teachers	2.75 FTE *
• Middle School RTI Teachers	2.75 FTE *

\* The original plan included 5.5 FTE for Elementary RTI teachers and 5.5 FTE for Middle School RTI teachers. At year end closing, the expense for 2.75 FTE for Elementary RTI teachers and 2.75 FTE for Middle School RTI teachers was transferred to the General Fund.

**BERKELEY UNIFIED SCHOOL DISTRICT  
 BERKELEY SCHOOLS EXCELLENCE PROGRAM (BSEP)  
 CLASS SIZE REDUCTION (Measure A, Resource 0841)  
 Revenue and Expenditures  
 Comparison Report FY 2013/14**

**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;  
 Neil Smith, Assistant Superintendent for Educational Services

	<b>Audited Actuals 2012/13 as of 6/30/13</b>	<b>Adopted Budget 2013/14 as of 7/1/13</b>	<b>(a) 2nd Interim Budget 2013/14 as of 1/31/14</b>	<b>(b) Unaudited Actuals 2013/14 as of 6/30/14</b>	<b>(b)-(a) 2nd Interim Budget vs. Unaudited Actuals 2013/14</b>
<b>REVENUE</b>					
Revenue	15,489,704	15,734,186	15,867,723	15,984,697	116,974
BSEP Contribution to General Fund (1)	(11,729,105)	(11,587,900)	(11,698,300)	(12,083,984)	(385,684)
BSEP Direct Support (2)	(376,324)	(377,500)	(381,100)	(380,081)	1,019
BSEP Substitute Compensation (1)	(231,080)	(223,600)	(225,800)	(224,581)	1,219
<b>NET REVENUE</b>	<b>3,153,195</b>	<b>3,545,186</b>	<b>3,562,523</b>	<b>3,296,051</b>	<b>(266,472)</b>
<b>EXPENDITURES</b>					
Certificated Monthly Salaries (3)	1,656,658	2,041,889	1,995,727	1,681,608	(314,119)
Certificated Counselors Salaries (3)	378,281	367,487	371,510	380,892	9,382
Employee Benefits (3)	576,992	717,990	658,499	549,207	(109,292)
Unallocated Reserve	0	0	0	0	0
Indirect Costs	955,205	1,030,791	1,030,791	1,029,713	(1,078)
<b>TOTAL EXPENDITURES</b>	<b>3,567,136</b>	<b>4,158,157</b>	<b>4,056,527</b>	<b>3,641,420</b>	<b>(415,107)</b>
<b>NET INCREASE (DECREASE)</b>	<b>(413,941)</b>	<b>(612,971)</b>	<b>(494,004)</b>	<b>(345,369)</b>	<b>148,635</b>
<b>FUND BALANCE ANALYSIS</b>					
Beginning Fund Balance	1,315,750	901,809	901,809	901,809	0
Net Increase (Decrease) in Fund Balance	(413,941)	(612,971)	(494,004)	(345,369)	148,635
Ending Fund Balance	901,809	288,838	407,805	556,440	148,635

**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 131.53 FTE.

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



- (3) Total FTE directly charged to Class Size Reduction includes 21.50 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 34.30 FTE. 5.5 FTE of elementary and middle school RTI expense was moved to the General Fund at closing, reducing the total FTE to 28.8.

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

**OVERVIEW: FY 2013-14**

**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 programs<sup>1</sup>*

**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 2013-14 was \$2,444,567. This allowed for allocations to the sites of \$233 per pupil.<sup>2</sup> No additional funds were allocated from the fund balance for this purpose. The expenditure budget for FY 2013-14 was based on this revenue allocation to each site, plus the carryover generated by unspent balances for each site.<sup>3</sup>

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** (72.4% of total actual expenditures)

*Budget: \$1,881,211                      Actual: \$1,780,743                      Variance: (100,468)*

- Certificated salaries    \$ 812,700
- Classified salaries       \$ 601,932
- Employee benefits       \$ 366,111

The above figures are from the Unaudited Actuals for 2013-14 as of June 30, 2014.

**Books and Supplies** (7.7% of total expenditures)

*Budget: \$265,848                      Actual: \$190,001                      Variance: (75,847)*

**Contracted Services** (13.1% of total expenditures)

*Budget: 356,193                      Actual: \$324,162                      Variance: (32,031)*

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<sup>1</sup> BSEP Measure A, Section 3.B.i

<sup>2</sup> 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 2013-14, the adjusted projected enrollment was 9,756 students.

<sup>3</sup> 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 2013-14, the unspent balance of \$472,456 was posted as carryover along with the associated Indirect Cost, once the books were closed in September.

### **Indirect Costs**

*Budget: \$187,551*

*Actual: \$155,757*

*Variance (31,794)*

The variance between budgeted and actual expenditures for Certificated and Classified staff was largely due to unspent hourly allocations and amounted to approximately 5% of the staffing budget. Roughly 28% of site budgets originally allocated for instructional materials went unspent.

### **Fund Balance**

*Beginning: \$610,110*

*Ending: \$622,999*

*Increase: \$12,889*

### **RESOURCE SUMMARY:**

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

At the end of 2013-14, a majority of sites had unexpended funds in their BSEP Site Discretionary budgets, ranging from a low of \$1,618 at BTA to a high of \$72,919 at the Pre-K sites, for an average of \$26,247. Approximately \$151,000 of carryover from previous years remained unallocated, an average of \$8,400 per site. All BSEP School Discretionary dollars allocated, but unspent, by the sites at the end of FY 2013-14, have been carried over to this year's site budgets for expenditure in FY 2014-15.

### **STATUS REPORT**

The School Site Discretionary funds continued to provide a broad variety of programs during the school day, with significant resources funding positions and 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 as well as basic services such as noon supervision. In several cases, BSEP funds provided over 50% of instructional materials and equipment at the school sites, for an average of 34.5% district-wide. Although no two School Plans were alike, BSEP-funded resources primarily supported the District goals of improving academic achievement and promoting student success.

#### Summary of Programs Funded

- **Academic Support:**

- **Pre-K:** Bookbag Literacy Program;
- **K-5:** Literacy Coaches, English Language Development (ELD), and Bilingual Support Teachers, in-school and afterschool academic intervention & 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), R.I.S.E. Scholars program, English Learner

*BSEP Measure A, Resource 0852*

Tutors, College/Career Advisors, Independent Study Program Study Skills Mentor & Tutors, BTA academic software.

- **Professional Development (Pre-K – 12):**
  - Substitutes to release Pre-K teachers and IAs to collaborate with “Creative Curriculum” teams;
  - Substitutes for Staff Professional Development, hourly curriculum development, District-approved conferences.
- **Mentoring, Counseling, Behavioral Support, and Safety:**
  - **Pre-K:** Counseling/Universal Learning Support Services (ULSS) from Child Therapy Institute (CI);
  - **K-5:** Parent Liaison, case management/family support from Bay Area Community Resources (BACR) and City of Berkeley Mental Health, RtI teaching/coordination, Mosaic Project diversity awareness program, Noon Supervisors;
  - **6-8:** RtI coordination, Mentors from Keepin’ It Real program (Nikao Youth Enrichment Services) and Stiles Hall, Mental Health Counselors, AVID program, Noon Directors;
  - **9-12:** Berkeley High Intervention Coordinator, BTA Student Welfare and Attendance Specialist, R.I.S.E. Scholars/Mentors, BHS Outsiders’ Club College Prep class with Berkeley City College, .
- **Strengthening School-Family Connections:**
  - **K-5:** Rosa Parks Family Resource Center Parent 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 and Art classes;
  - **K-5:** Visual Arts, Dance, Music, and Drama classes, Physical Education instruction, Berkeley YMCA P.E. & recess program;
  - **6-8:** Art 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, Computer Teacher, field trips such as Sierra Outdoor School.
- **Instructional Materials & Equipment (Pre-K-12):**
  - **Science:** consumables and lab equipment, garden supplies;
  - **Math:** web-based math program;
  - **Art:** visual art supplies and equipment, performing arts materials;

- **Literacy:** classroom library books;
- **Technology:** computers, software, document cameras and carts.

**BERKELEY UNIFIED SCHOOL DISTRICT  
 BERKELEY SCHOOLS EXCELLENCE PROGRAM (BSEP)  
 SCHOOL SITE DISCRETIONARY PROGRAM (Measure A, Resource 0852)  
 Revenue and Expenditures  
 Comparison Report FY 2013/14**

**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

	(b)		(a)	(b)	(b)-(a)
	Audited Actuals 2012/13 as of 6/30/13	Adopted Budget 2013/14 as of 7/1/13	2nd Interim Budget 2013/14 as of 1/31/14	Unaudited Actuals 2013/14 as of 6/30/14	2nd Interim Budget vs. Unaudited Actuals 2013/14
<b>REVENUE</b>	2,406,103	2,443,567	2,464,305	2,483,010	18,705
<b>EXPENDITURES</b>					
Certificated Salaries	698,439	773,514	814,229	812,700	(1,529)
Classified Salaries	588,156	607,674	647,503	601,932	(45,571)
Employee Benefits	370,663	421,210	419,479	366,111	(53,368)
Books & Supplies	279,532	90,774	265,848	190,001	(75,847)
Equipment	0	2,000	11,199	19,459	8,260
Unallocated Reserve	0	122,867	272,348	0	(272,348)
Contracted Services	269,863	255,109	356,193	324,162	(32,031)
Indirect Costs	141,000	152,982	187,551	155,757	(31,794)
<b>TOTAL EXPENDITURES</b>	2,347,653	2,426,130	2,974,350	2,470,121	(504,229)
<b>NET INCREASE (DECREASE)</b>	58,450	17,437	(510,045)	12,889	522,934
<b>FUND BALANCE ANALYSIS</b>					
Beginning Fund Balance	551,659	610,110	610,110	610,110	0
Net Increase (Decrease) in Fund Balance	58,450	17,437	(510,045)	12,889	522,934
Ending Fund Balance	610,109	627,547	100,065	622,999	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, Berkeley Technology Academy (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.





**Employee Benefits:**

<i>Budget: \$184,764</i>	<i>Actual: \$180,382</i>	<i>Variance: (\$4,382)</i>
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**Instructional Materials, Instruments and Equipment**

<i>Budget: \$84,338</i>	<i>Actual: \$81,272</i>	<i>Variance: (\$3,066)</i>
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**Conference/Mileage/Instructional Contracts**

<i>Budget: \$108,700</i>	<i>Actual: \$82,545</i>	<i>Variance (\$26,155)</i>
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**Indirect Costs**

<i>Budget: \$106,297</i>	<i>Actual: \$ 102,012</i>	<i>Variance: \$(4,285)</i>
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**Fund Balance**

<i>Beginning: \$272,256</i>	<i>Ending: \$168,172</i>	<i>Decrease: \$104,084</i>
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**RESOURCE SUMMARY**

The fund balance for this resource had been decreasing at an unsustainable rate over the past years due to enrollment increases. The primary driver of the deficit spending is associated with the increased FTE for music teachers (both transfer and directly-charged) necessary to maintain the program for influx of students. A total of 2,256 fourth-eighth grader students participated in the Music Program, an increase of 19% in three years. Enrollment in grades 4-8 music classes increased by 140 students (16.6%) between 2011-12 and 2013-14; FTE increased accordingly by 0.64 FTE. Instruments and materials were provided for the additional students at a cost of \$15,000. In May of 2014, the BUSD School Board agreed to reduce the transfer to the General Fund by 50% to slow the depletion of the fund balance.

In addition to the music teachers paid for as a transfer to the General Fund, supplemental music teachers for grades 4 and 5 provide more options for students at each music period, including brass, woodwind, and string classes. Students in fourth and fifth grade are scheduled into music classes of 12-18 students according to choice of instrument. Providing smaller classes to focus on one or two instruments ensures that all students will successfully meet grade level music standards. Without these supplemental teachers, classes would be at 24-26 students, with eight different instruments taught in the same class. In total, the FTE for the fourth and fifth grade music program requires 9.04 FTE.

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

**STATUS REPORT**

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

The core programs supported by BSEP VAPA funds are:

- Staffing and materials for the grades 4-8 Music Program, including music classes for all fourth and fifth graders, and in addition, materials for all third graders;
- Staffing support for afterschool arts classes at the middle schools;
- Drama materials for grades 6-8;
- Support for the Berkeley Symphony Orchestra Music in the Schools Program at eleven elementary schools;
- Professional development for classroom teachers in arts integration at eight elementary schools;
- Professional development for music and arts teachers;
- Staffing support for outreach programs and partnerships such as Arts on The Run, Kennedy Center Partnership with Cal Performances, Berkeley Arts Education Steering 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 the past year include:

- For the second year, BUSD was selected as one of the "Best Communities for Music Education 2014" 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 were expanded to include ukulele, guitar and mariachi instruction.
- All students were provided with a well-functioning instrument of their choosing, grade level method books, supplemental sheet music, and necessary accessories such as strings, valve oil and cork grease.
- Music teachers piloted a culturally-relevant supplemental music book which includes a play-along CD. The tunes were composed by BUSD alumni.
- Music teachers designed PBIS "You Rock" and "Out of Tune" slips which they continued to use successfully with their grade 3-8 students.
- 240 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 2014.

**BERKELEY UNIFIED SCHOOL DISTRICT  
BERKELEY SCHOOLS EXCELLENCE PROGRAM (BSEP)  
MUSIC , VISUAL AND PERFORMING ARTS (Measure A, Resource 0853)**

**Revenue and Expenditures  
Comparison Report FY 2013/14**

**Purpose**

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

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

	(a)	(b)	(b)-(a)		
	Audited Actuals 2012/13 as of 6/30/13	Adopted Budget 2013/14 as of 7/1/13	2nd Interim Budget 2013/14 as of 1/31/14	Unaudited Actuals 2013/14 as of 6/30/14	2nd Interim Budget vs. Unaudited Actuals 2012/14
<b>REVENUE</b>					
Revenue	1,466,852	1,489,980	1,502,626	1,513,702	11,076
Transfers to General Fund (Release Time) (1)	(446,446)	(418,125)	(418,125)	(412,448)	5,677
<b>NET REVENUE</b>	<b>1,020,406</b>	<b>1,071,855</b>	<b>1,084,501</b>	<b>1,101,254</b>	<b>16,753</b>
<b>EXPENDITURES</b>					
Certificated Salaries	645,735	679,981	680,074	706,742	26,668
Classified Salaries	50,084	54,992	50,310	48,853	(1,457)
Employee Benefits	181,672	200,655	184,764	180,382	(4,382)
Instructional Materials/Instruments	60,253	73,000	84,338	81,272	(3,066)
Equipment	0	15,000	3,662	3,533	(129)
Unallocated Reserve	4,585	33,997	49,477	0	(49,477)
Conference/Mileage/Instructional Contracts	86,923	103,700	108,700	82,545	(26,155)
Capital Outlay	0	0	0	0	0
Indirect Costs	94,297	106,297	106,297	102,012	(4,285)
<b>TOTAL EXPENDITURES</b>	<b>1,123,550</b>	<b>1,267,622</b>	<b>1,267,622</b>	<b>1,205,338</b>	<b>(62,284)</b>
<b>NET INCREASE (DECREASE)</b>	<b>(103,144)</b>	<b>(195,767)</b>	<b>(183,121)</b>	<b>(104,084)</b>	<b>79,037</b>
<b>FUND BALANCE ANALYSIS</b>					
Beginning Fund Balance	375,400	272,256	272,256	272,256	0
Net Increase (Decrease) in Account Balance	(103,144)	(195,767)	(183,121)	(104,084)	79,037
Ending Account Balance	272,256	76,489	89,135	168,172	79,037

(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.

**PUBLIC INFORMATION, TRANSLATION SERVICES, and  
SUPPORT OF THE PLANNING AND OVERSIGHT COMMITTEE  
(BSEP Measure A, Resource 0854)**

**OVERVIEW: FY 2013-14**

**Purpose**

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

**Budget Managers:** **Donald Evans, Superintendent**  
**Natasha Beery, Director of BSEP and Community Relations**

**Classified Salaries**

*Budget: \$310,113* *Actual: \$314,745* *Variance: (\$4,632)*

- Director of BSEP and Community Relations 1.0 FTE
- BSEP Program Specialist 1.0 FTE
- Public Information Officer 1.0 FTE
- Specialist, Translation and Interpretation 0.5 FTE<sup>2</sup>

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

**Employee Benefits**

*Budget: \$111,953* *Actual: \$111,415* *Variance: (\$538)*

**Contracted Services**

*Budget: \$103,000* *Actual: \$78,652* *Variance: (\$24,348)*

**Equipment and Supplies**

*Budget: \$25,000* *Actual: \$6,129* *Variance: (\$18,871)*

**Fund Balance**

*Beginning: \$338,207* *Ending: \$321,538* *Decrease: (\$16,669)*

**RESOURCE SUMMARY:**

This public information resource has a significant fund balance due to prior under-staffing during two years of transition in the office. The office was fully staffed in 2013-14 and did not require as much of the planned-for additional hourly work to augment the salaried staff once a fall training period was completed. Expenses for supplies for a booth for public outreach and graphic/logo work were less than anticipated. The fund balance will be drawn upon in 2014-15 to augment the work of the new Parent Resource Center, provide more BSEP Awareness materials,

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<sup>1</sup> BSEP Measure Section 6A

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

along with the ongoing production of the A+ News, Website, Bi-Annual report and other outreach and information efforts.

## **STATUS REPORT**

The core functions supported by this budget in FY 2013-14 and highlights from the past year included:

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

The BSEP Director and Program Specialist have responsibility for:

- Implementation and monitoring of operational and technical tasks which place the BSEP funds in the District's financial systems, working alongside the Senior Budget Analyst to ensure careful oversight of fund expenditures;
- Partnership with each school Principal and School Governance Council to analyze and develop the BSEP School Discretionary Fund budget and plan;
- Support for the September School Governance Council (SGC) elections and the appointment of P&O Representatives from each school site in October;
- SGC and Parent Leader Orientation Workshops in October, and Orientation for new P&O Representatives in November.
- Preparation of the annual SGC Election, 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.

### 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, Superintendent's Office, and Technology, and makes strategic use of outside contractors for some content, consultation, translation, printing, and mailing services.
- In FY 2013-14 some of the "top content" items that needed consistent communication and strategic community involvement, included:
  - Local Control and Accountability Plan
  - District Finances/Budget
  - Transition to Common Core
- To reach our varied audiences and meet their diverse communication needs, a combination of traditional and new media tools and channels were employed, including: website, homepage blog posts, school & community postings/flyers, letters to families, online surveys, email, phone blasts, school newsletters, community forums, and tabling at community events.
- The A+ *eNews*, produced in both English and Spanish on a bi-monthly basis, is the primary communication tool for keeping families and community apprised of the events, programs, services, and new initiatives in Berkeley public schools through direct subscriber email delivery and website access. In addition, limited paper copies are provided at school sites. The A+ *eNews* is sent electronically every two weeks to over

2,000 staff and over 7,000 parents and community members. It is translated into Spanish and sent to a growing list of Spanish-language subscribers (currently at 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.
- In addition to the use of established communication channels, Online Community Surveys, Public Forums, and stakeholder group meetings provided community engagement opportunities and valuable input that informed the Local Control and Accountability Plan.

#### Berkeley Schools Biannual Report

This BSEP Resource paid for the production of a fall and spring Bi-Annual report that was mailed to all 46,000 residential addresses in Berkeley. It was also translated into Spanish, and both English and Spanish print versions were distributed at schools. Berkeley taxpayer dollars fund 20% of the BUSD General Fund budget through the BSEP tax; the four page document focused on the District budget, including BSEP funded programs, and an update on new and continuing construction projects. The Biannual Report also serves as a resource for the human resources, admissions, and other District departments involved in outreach to prospective faculty, staff, and families.

#### Public Information Officer

- Produced 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 every Monday;
- 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 2013-14, the BSEP Office and Translation Specialist provided Spanish translation and interpretation to support district-wide and school site-specific communications, including:

#### Translation of Documents:

- A+ Newsletter (every two weeks)
- Biannual Report (twice yearly)
- SGC documents for schools
- Parent-Student Handbook, and other mandated district documents
- Educational Services Documents: EL Master Plan, Common Core, Report Cards, Story of Units, and much more
- Elementary and Secondary SGC Flyers: How to Get Involved
- PTSA Statements for BSEP and SSC Candidature
- Welcoming letters and message from principals
- Translation of API 2014
- Sexual Harassment Letters
- Universal Consent for School Based Services
- LCAP Documents and Powerpoints
- DELAC Documents and Powerpoints
- Translation of document and power point presentations for LCAP
- Translation of Report Cards for Math and English
- BEARS and LEARNS communications
- Translation of Parent Student Handbook - 48+ pages
- Translation and Interpretation for Tool Box Project

#### Simultaneous Interpretation:

- Interpretation for Local Control and Accountability Plan meetings
- 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 for different departments from Office of Family Engagement and Equity to 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. Increasing use is being made of Language Line, with users reporting very high quality services offered in languages including Chinese (Mandarin, Cantonese, Hakka), Amharic, and Arabic (Yemeni and other dialects). In addition, our hourly on-call interpreters have provided interpretation for parent meetings in Spanish, Arabic, and French.

**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 FY2013/14**

**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

			(a)	(b)	(b)-(a)
	Audited	Adopted	2nd Interim Budget	Unaudited	2nd Interim Budget vs. Unaudited
	Actuals	Budget	Budget	Actuals	Actuals
	2012/13	2013/14	2013/14	2013/14	2013/14
	as of	as of	as of	as of	Actuals
	6/30/13	7/1/13	1/31/14	6/30/14	2013/14
<b>REVENUE</b>	478,964	486,524	490,653	494,271	3,618
<b>EXPENDITURES</b>					
Classified & Certificated Salaries	261,680	305,088	310,113	314,745	4,632
Employee Benefits	84,503	118,732	111,953	111,415	(538)
Supplies/Equipment	2,007	20,000	17,600	2,764	(14,836)
Unallocated Reserve	0	12,880	10,812	0	(10,812)
Equipment	0	5,000	7,400	3,365	(4,035)
Contracted Services	78,195	102,000	103,000	78,652	(24,348)
<b>TOTAL EXPENDITURES</b>	426,386	563,700	560,878	510,940	(49,938)
<b>NET INCREASE (DECREASE)</b>	52,579	(77,176)	(70,225)	(16,669)	53,556
<b>FUND BALANCE ANALYSIS</b>					
Beginning Fund Balance	285,628	338,207	338,207	338,207	0
Net Increase (Decrease) in Fund Balance	52,579	(77,176)	(70,225)	(16,669)	53,556
Ending Fund Balance	338,207	261,031	267,982	321,538	53,556





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 2012-13. With the 2013-14 year, the balance showed remaining funds due to shifts in funding. The projection was to fund 7.84 FTE of professional development salaries, but with shifting, that amount decreased to 6.79 FTE.

## **STATUS REPORT**

In 2013-14, Professional Development priorities included a focus on literacy, English learners, Response to Instruction and Intervention, support for new teachers, and support in implementing the Common Core State Standards and the new Smarter Balance Assessments. Highlights from last year included:

- Support for the Teacher College Reading and Writing Project (TCRWP) curriculum to meet the diverse needs of K-5 students;
- Professional Learning Communities for Literacy Coaches, ensuring the implementation of best practices throughout the district;
- Workshops and coaching in Systematic ELD to improve instruction for English Learners;
- The development and use of more common assessments followed by collaborative analysis of student performance;
- Using teacher leaders as liaisons collaborating together, providing professional development, and supporting sites with curriculum implementation and use of effective instructional strategies;
- Three-day Constructing Meaning workshops, primarily at BHS, to improve instructional practices and student performance, and to attain the goal of training all high school teachers;
- Training and support in implementing a system of Positive Behavioral Intervention and Support at pre-K–8 sites;
- Guidance and support for teachers to use a variety of educational technology tools, such as online tutorials, interventions, diagnostics, Google Docs, and other resources;
- Support in preparation and implementation of the Smarter Balance Assessment taken for the first time in the spring, including support for students developing typing skills.

**BERKELEY UNIFIED SCHOOL DISTRICT  
BERKELY SCHOOLS EXCELLENCE PROGRAM (BSEP)  
PROFESSIONAL DEVELOPMENT  
Revenue and Expenditures (Measure A, Resource 0855)  
Comparison Report FY 2013/14**

**Purpose**

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

**Budget Manager:** Neil Smith, Assistant Superintendent for Educational Services  
Michelle Sinclair, Coordinator of Professional Development

	(a) 2nd Interim Budget 2013/14 as of 6/30/13	(b) Unaudited Actuals 2013/14 as of 6/30/14	(b)-(a) 2nd Interim Budget vs. Unaudited Actuals 2013/14		
<b>REVENUE</b>	760,403	772,405	778,960	785,703	6,743
<b>EXPENDITURES</b>					
Certificated Salaries	668,638	684,886	619,173	569,393	(49,780)
Classified Salaries	29,493	0	0	47	47
Employee Benefits	174,154	181,344	146,613	137,804	(8,809)
Materials & Supplies	158	0	0	0	0
Unallocated Reserve	0	7,970	5,000	0	(5,000)
Services & Other Operating Expenses	16,164	25,000	31,000	15,184	(15,816)
Indirect Costs	56,782	60,516	53,960	48,619	(5,341)
<b>TOTAL EXPENDITURES</b>	945,388	959,716	855,746	771,047	(84,699)
<b>NET INCREASE (DECREASE)</b>	(184,985)	(187,311)	(76,786)	14,656	91,442
<b>FUND BALANCE ANALYSIS</b>					
Beginning Fund Balance	376,611	191,626	191,626	191,626	0
Net Increase (Decrease) in Fund Balance	(184,985)	(187,311)	(76,786)	14,656	91,442
Ending Fund Balance	191,626	4,315	114,840	206,282	91,442

**Notes**

\$50,000 for Teacher Initiated Professional Development is included in the salary, benefits and services expenses.



**Services and Operating Expenses**

Budget: \$ 81,500

Actual: \$62,682

Variance: (\$18,818)

Costs for Services and Operating Expenses were reduced through the use of *Illuminate* resulting in a reduction in contract expenses for other Assessment Vendors and *SPSS*.

**Indirect Costs**

Budget: \$41,434

Actual: \$36,217

Variance (\$5,217)

**Fund Balance**

Beginning: \$78,842

Change: \$35,972

Ending: \$114,814

**RESOURCE SUMMARY**

Evaluation revenue increased while expenditures decreased during FY 2013-14, primarily due to staffing changes. In addition, savings from contracted services reduced the need to use the fund balance to support the Evaluation program. Although certificated staff expense decreased during the year, a retroactive salary increase for FY 2013-14 was paid during the year according to the contracts with Certificated staff. The total payment was \$12,472.

**STATUS REPORT**

Following is a summary report of the activities accomplished with this BSEP Resource during FY 2013-14. Additional activities funded through other sources are not detailed in this report.

<u>Professional Development / Training Delivered by Evaluation Staff</u> <sup>4</sup>	<u>Number of Trainees</u>
<ul style="list-style-type: none"> <li>● 14 Illuminate Assessment System training days:               <ul style="list-style-type: none"> <li>○ Dashboard, Your Classroom</li> <li>○ Formative Assessments and Itembank</li> <li>○ Online Assessments and link to CCSS</li> <li>○ How to monitor student groups</li> <li>○ Creating reports to inform intervention</li> </ul> </li> <li>● 4 Survey Monkey Trainings</li> <li>● 10 Berkeley High School (BHS) training for leadership</li> <li>● 10 Administrative trainings (Using Data to Inform)</li> <li>● Site Based Professional Development / Support      All Schools, 1 to 2 times per week               <ul style="list-style-type: none"> <li>○ Illuminate (see areas above)</li> <li>○ Using Assessments to inform Instruction</li> <li>○ Transitioning to a Digital Assessment Environment</li> <li>○ Reports for Principal, Leadership Teams</li> </ul> </li> </ul>	<ul style="list-style-type: none"> <li>~20-25 per training</li> <li>~25 total</li> <li>~75 total</li> <li>~30 per training</li> </ul>

<sup>4</sup> (Contracted software / systems paid for by BSEP funds such as Illuminate, Intel-Assess, SQL and Survey Monkey are listed by name.)

District Assessment Support: FY2013-14 was a transitional year for benchmark assessments. Because of the educational shift to the implementation of the Common Core State Standards (CCSS), the District Assessments and other reporting tools changed. While it was a learning year for CCSS, staff still continued to provide production support for all district assessments, including 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. The table below provides a matrix of the local “benchmark” assessments that the Director and Evaluation staff produced for staff in FY2013-14:

<b>Subject Area</b>	<b>Grade Levels</b>	<b>How Often</b>
English Language Arts (ELA) / Reading	K-12	K-5 (3x); MS / HS (2x)
Writing / Constructed Response	K-12	K-5 (3x); MS / HS (2x)
Mathematics	K-12	K-5 (3x); MS / HS (2x)
Kindergarten Universal Screener / Readiness Tool	K / TK / PK	First Two Weeks

School Principal and Site-Level Support: Each member of the Berkeley Research, Evaluation and Assessment (BREA) staff was assigned to one or more school sites. The BREA staff member met with each site principal on a regular basis (at least monthly) providing research, program evaluation and reporting tools customized for the site or principal. Above and beyond the reports listed below, staff provided Principals with supplementary data analysis, assisted them in planning or preparing data presentations to staff, leadership groups and the School Governance Council (SGC). Staff also supported principals by coaching them to use Illuminate, Survey Monkey or PowerSchool.

Smarter-Balanced Assessment Field Test Support: In FY2013-14, all schools received BREA support in field-testing the new Smarter Balanced Assessment in a classroom environment. This included training teachers on how to administer the online test, supporting classrooms and then evaluating the process upon its completion.

Reports: The BREA Director and staff provided reports both electronically and in paper copy that the School Board, District Administrators, and Schools can use to inform their practice.

These reports are available on the Berkeley.net website including:

- 10 School Board Data Presentations
- 16 School Information Sheets (in English and Spanish) and 1 District Information Sheet
- 16 Data Presentations for SGC or SSC and School Staff (all schools)
- Class Profile reports in Illuminate for every classroom teacher (available and ready to use by August 27, 2013)
- 20 District Assessment Summary reports
- 16 School Indicators of Success

BHS (Berkeley High School) and Berkeley Technology Academy (BTA) Evaluation Support: Trained BTA site Teachers on Special Assignment (TSA) on Illuminate and provided data presentation summaries for use with Western Association of Schools and College accreditation visit. Provided data support for the Program Evaluation consultant for the final evaluation of the Small Learning Community Grant for Berkeley High School.

2020 Vision Support and Partnership: Director D'Angelo participated in the *2020 Vision* Design Team with Assistant Superintendent Smith which included a series of seven *2020 Vision* Design Team meetings with City and Alliance staff. In addition, over 1,000 hours of meetings and data analysis were conducted with *2020 Vision* partners resulting in a joint City / Governing Board update and evaluation of the five key *2020 Vision* indicators: Kindergarten Readiness; Reading Fluently by Third Grade; Passing Eighth Grade Mathematics; Eliminating Chronic Absenteeism (coming to school on time and ready to learn); and Reducing Student Suspensions and the Disproportionality of Suspensions.

Development and Evaluation of the Local Control and Accountability Plan (LCAP): In coordination with many stakeholder groups, district staff and a dynamic team of lead district staff, Director D'Angelo and BREA staff supported the LCAP development process through acting as secretary and lead evaluator of the LCAP for FY2013-14.

Elementary Common Core Report Card Committee: Director D'Angelo facilitated and BREA staff participated in a report card committee charged with creating a report card that aligns to the new CCSS and is family, student and teacher friendly. The committee reviewed Report Cards throughout the state and developed a process to review report card entry in both Illuminate and PowerSchool. By June, 2014, the team had developed a reporting tool that would enable individual and program evaluation of how students are doing with the new "Toolbox" curriculum, their engagement with and knowledge of the new CCSS and also what they know and are able to do.

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

**BERKELEY UNIFIED SCHOOL DISTRICT  
 BERKELEY SCHOOLS EXCELLENCE PROGRAM (BSEP)  
 EVALUATION (Measure A, Resource 0856)  
 Revenue and Expenditures  
 Comparison Report FY2013/14**

**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:** Neil Smith, Assistant Superintendent for Educational Services  
 Debbi D'Angelo, Director of Evaluation and Assessment

	(b)		(a)		(b)	(b)-(a)
	Audited	Adopted	2nd	Unaudited	2nd	(b)-(a)
	Actuals	Budget	Interim	Actuals	Interim	Budget
	2012/13	2013/14	Budget	2013/14	Budget	vs.
	as of	as of	as of	as of	as of	Unaudited
	6/30/13	7/1/13	1/31/14	6/30/14	6/30/14	Actuals
						2013/14
<b>REVENUE</b>	591,426	600,760	605,859	610,325		4,466
<b>EXPENDITURES</b>						
Certificated Salaries	305,853	299,099	308,822	294,089		(14,733)
Classified Monthly Support Salaries	92,181	96,464	96,472	83,649		(12,823)
Employee Benefits	110,022	122,417	107,423	94,484		(12,939)
Books & Supplies	665	10,000	10,000	2,095		(7,905)
Equipment	4,571	0	0	1,137		1,137
Unallocated Reserve	0	6,180	11,443	0		(11,443)
Services & Other Operating Expenses	50,874	81,500	81,500	62,682		(18,818)
Indirect Costs	36,050	41,434	41,434	36,217		(5,217)
<b>TOTAL EXPENDITURES</b>	600,217	657,094	657,094	574,353		(82,741)
<b>NET INCREASE (DECREASE)</b>	(8,791)	(56,334)	(51,235)	35,972		87,207
<b>FUND BALANCE ANALYSIS</b>						
Beginning Fund Balance	87,633	78,842	78,842	78,842		0
Net Increase (Decrease) in Fund Balance	(8,791)	(56,334)	(51,235)	35,972		87,207
Ending Fund Balance	78,842	22,508	27,607	114,814		87,207



**PARENT OUTREACH SERVICES**  
**(BSEP Measure A, Resource 0857)**

**OVERVIEW: FY 2013-14**

**Purpose:**

*Support the families of Berkeley's public school students by providing parent education and promoting greater parent involvement in their children's education<sup>1</sup>*

**Budget Managers:** Neil Smith, Assistant Superintendent of Educational Services, with Charity DaMarto, Supervisor of Family Engagement and Equity

**Staff**

<i>Budget: \$251,123</i>	<i>Actual: \$198,319</i>	<i>Variance: (\$52,804)</i>
<ul style="list-style-type: none"> <li>● Site Coordinators 2.0 FTE</li> <li>● Site Coordinator, Bilingual 1.0 FTE</li> <li>● High School Parent Liaison .27 FTE<sup>2</sup></li> <li>● Supervisor of Family Engagement 1.0 FTE<sup>3</sup></li> </ul>		

The decrease in expenditures was due to a mid-year change in staffing, together with lower usage of teacher hourly for workshops.

**Employee Benefits**

<i>Budget: \$77,989</i>	<i>Actual: \$61,761</i>	<i>Variance: (\$16,228)</i>
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**Books, Supplies and Equipment**

<i>Budget: \$5,000</i>	<i>Actual: \$3,113</i>	<i>Variance: (\$1,887)</i>
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**Services and Other Operating Expenses**

<i>Budget: \$33,500</i>	<i>Actual: \$34,481</i>	<i>Variance (\$981)</i>
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**Indirect Costs**

<i>Budget: \$26,422</i>	<i>Actual: \$20,033</i>	<i>Variance: (\$6,389)</i>
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**Fund Balance**

<i>Beginning: \$318,462</i>	<i>Ending: \$303,531</i>	<i>Decrease: \$14,931</i>
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**RESOURCE SUMMARY**

This was the second implementation year of a pilot program for Parent Outreach based on a Board approved plan. Family Engagement Site Coordinators were assigned to specific sites for the year. Expenses were somewhat lower than expected due to under-utilized teacher hourly compensation for workshops, and due to a mid-year change in staffing, with positions filled temporarily with hourly staff. This led to an associated decrease in benefits and in indirect costs. Books, supplies and equipment purchases included parent education materials and

<sup>1</sup> BSEP Measure A Section 3.B.iic

<sup>2</sup> Multi-funded 1.0 FTE position: .053 from BSEP Site Discretionary Funds and .20 from Economic Impact Aid

<sup>3</sup> Multi-funded 1.0 FTE position: 0.5 from BSEP Professional Development

equipment for the Site Coordinators. Other operating expenses incurred were for staff professional development and the Black Parent Affinity Retreat. In the area of contracts, OFEE contracted with The Berkeley Alliance and Bay Area Parent Leadership Action Network.

## **STATUS REPORT**

Highlights from the 2013-2014 Year:

### Developed Mission Statement

- To create welcoming and equitable schools throughout the district.
- To provide targeted support and guidance to school staff and families in order to build meaningful partnerships that foster success for all students.

### Created a welcoming environment for all families

- Increased ELAC participation by providing technical support and training. OFEE was pivotal in starting dormant ELAC groups at Emerson and BAM and supporting already-established groups at other school sites.
- Collaborated with Rosa Parks Family Resource Center on the annual district-wide Summer Resource Fair.
- Provided two Supplemental Educational Service parent information workshops. Staff led on-site support for parents to fill out applications and contact local providers.
- Began a district-wide Black Parent Affinity Group. We launched the group with a retreat attended by 35 parent leaders, school administrators and school board members. This core group of parent leaders made a commitment to continue and meet once a month during the 2014-2015 school year.

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

- The OFEE provided over 215 parents with direct services and resources, which included:
  1. Connecting parents with local organizations to find housing, food, and transportation;
  2. Assisting parents to find housing and counseling resources;
  3. Helping parents prepare for SST/ IEP's and attending meetings with them;
  4. Reviewing student IEPs with parents to help them better understand the plan;
  5. Planning and coordinating a memorial service for a BUSD parent and providing follow-up support to the student and family;
  6. Collaborating with District Behaviorists to better serve our students by providing wrap-around services;
  7. Providing attendance/health monitoring and support for students and families in need;
  8. Providing follow-up and support for focus families; and
  9. K-to-College school supply give-away.
- Site Coordinators documented all contact with parents at their sites, chronicling when parents came into the office and when school staff referred a family. By highlighting how parents were referred, how parents were contacted, and the services needed, the coordinators could identify and focus on the most requested services in order to guide the work for the 2014-2015 school year.

Increased the involvement of marginalized and under-represented parents (African-American, Latino and those not proficient in English)

- Participated in the District-Wide ELPAC for the Local Control and Accountability Plan
- Worked with Black Parent Affinity Group.
- Provided ombudsman services.

Planning for 2014-2015

- Define new department goals and focus.
- Incorporated LCAP goals into OFEE goals.
- Hire additional staff.

**BERKELEY UNIFIED SCHOOL DISTRICT  
 BERKELEY SCHOOLS EXCELLENCE PROGRAM (BSEP)  
 PARENT OUTREACH (Measure A, Resource 0857)  
 Revenue and Expenditures  
 Comparison Report FY 2013/14**

**Purpose**

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

**Budget Manager:** Neil Smith, Assistant Superintendent for Educational Services  
 Charity DaMarto, Supervisor of Family Engagement and Equity

	(a)	(b)	(b)-(a)		
	2nd	2nd	2nd	Interim	Budget
	Audited	Adopted	Interim	Unaudited	vs.
	Actuals	Budget	Budget	Actuals	Unaudited
	2012/13	2013/14	2013/14	2013/14	Actuals
	as of	as of	as of	as of	2013/14
	6/30/13	7/1/13	1/31/14	6/30/14	2013/14
<b>REVENUE</b>	293,366	297,996	300,525	302,776	2,251
<b>EXPENDITURES</b>					
Staff	135,757	256,896	251,123	198,319	(52,804)
Employee Benefits	45,341	85,345	77,989	61,761	(16,228)
Books & Supplies	6,225	5,000	5,000	3,113	(1,887)
Equipment	470	0	0	0	0
Unallocated Reserve	0	14,359	24,988	0	(24,988)
Services & Other Operating Expenses	3,534	31,000	33,500	34,481	981
Indirect Costs	12,226	26,422	26,422	20,033	(6,389)
<b>TOTAL EXPENDITURES</b>	203,554	419,022	419,022	317,707	(101,315)
<b>NET INCREASE (DECREASE)</b>	89,812	(121,026)	(118,497)	(14,931)	103,566
<b>FUND BALANCE ANALYSIS</b>					
Beginning Fund Balance	228,650	318,462	318,462	318,462	0
Net Increase (Decrease) in Fund Balance	89,812	(121,026)	(118,497)	(14,931)	103,566
Ending Fund Balance	318,462	197,436	199,965	303,531	103,566

**SCHOOL LIBRARIES**  
**(BSEP Measure A, Resource 0860)**  
**OVERVIEW: FY 2013-14**

**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.<sup>1</sup>*

**Budget Managers: Neil Smith, Assistant Superintendent for Educational Services**  
**Becca Todd, District Library Coordinator**

**Certificated Salaries**

<i>Budget: \$566,076</i>	<i>Actual: \$587,000</i>	<i>Variance: \$20,924</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: \$490,439</i>	<i>Actual: \$472,272</i>	<i>Variance: (\$18,167)</i>
● 11 Elementary Library Media Technicians	9.30 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: \$399,931</i>	<i>Actual: \$372,712</i>	<i>Variance: (\$27,219)</i>
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**Books and Supplies**

<i>Budget: \$199,714</i>	<i>Actual: \$172,302</i>	<i>Variance (\$27,416)</i>
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**Services and Other Operating Expenses**

<i>Budget: \$63,298</i>	<i>Actual: \$55,296</i>	<i>Variance: (\$8,002)</i>
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**Indirect Costs**

<i>Budget: \$120,285</i>	<i>Actual: \$111,690</i>	<i>Variance: (\$8,595)</i>
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**Fund Balance**

<i>Beginning: \$537,763</i>	<i>Ending: \$522,429</i>	<i>Decrease: \$15,334</i>
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<sup>1</sup> BSEP Measure A, Section 3.B.ii.

## **RESOURCE SUMMARY**

The relative strength of the fund balance allowed the increase of 0.1 FTE for the Library Media Technicians at five of the larger elementary schools, and the addition of a ½ time TSA Elementary Teacher Librarian. The original proposal for a 1.0 TSA and a sixth 0.1 Library Media Technician increase were unrealizable due to the life realities of the employees in those positions. Classified salaries and employee benefits were less than projected due to long term substitute circumstances at three sites (Emerson, Longfellow and Central Media Library). Cost savings in books, supplies and services were realized largely due to unfilled backorders that were then carried over to the current fiscal year.

## **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 2013-14.

### Student Engagement

Our BUSD libraries promote a strong reading culture with print and digital resources aligned to curricular assignments, as well as reader interest and initiative. Close to 247,000 books were circulated in the K-12 schools in 2013-14, up slightly from the prior year - even with Jefferson's library being closed for remodeling the entire year! (The librarian continued to support a limited circulation via a rolling book cart and mobile checkout.) The continued allocation of \$15 per pupil for library books and materials allowed the program to address the broad range of reading levels and interests of students and staff. There were highlighted authors and illustrators of many cultures and ethnicities, going beyond the annual heritage months.

Many of our libraries play a leading role in the district's growing use of technology. Typing Club is often introduced 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, including our fledgling ebook collection. We support research skills with a district-wide subscription to WorldBook Online. The middle schools also have a subscription to Teen Health and Wellness; the high schools have additional subscriptions to ABC-Clío, 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.

Our preschoolers were able to enjoy the Preschool Book Bag Lending Library the at the earliest start date ever, up and running in October. 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 2014, with a Library

Media Technician at both BEARS/EDC summer school sites (this year LeConte and Malcolm X) 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 and yields strong results by mitigating the common “summer slide.”

#### New Staff and Growing Library System

During the 2013-14 school year, new library staff were welcomed at Cragmont, Emerson, Longfellow, and the Central Media Library. Our familiarity with the Destiny library management system in year two of its adoption allowed us to expand into deeper levels of resources, such as providing simultaneous access to a pilot selection of ebooks and embedding topic-driven lists of curated websites behind visual search buttons. Our library staff support 9,500+ students with a welcoming, robust, and challenging library program.

#### Community Collaboration

BUSD libraries provide recommended elementary grade leveled-reading lists to the Berkeley Public Library to inform them about our use of the Fountas and Pinnell leveling system. Thus, when parents come in saying, “I need a level M!” they have a sampling of level M books and can guide them to similar titles. We also collaborate with the Berkeley Public Library to promote book clubs, individual library cards, online database research and summer reading. We host the Rotary Club’s third grade Dictionary Distribution. We sponsor author and illustrator visits; during the 2013-14 school year we were fortunate to have visits from Annie Barrows, Jeff Kinney, Megan McDonald, Christian Robinson, and a Skype visit with Kwame Alexander. A number of our staff are recognized leaders in the school library field, presenting at regional and national conferences on such topics as School and Public Library Collaboration, and Common Core and Library Programming.

**BERKELEY UNIFIED SCHOOL DISTRICT  
 BERKELEY SCHOOLS EXCELLENCE PROGRAM (BSEP)  
 LIBRARY PROGRAM (Measure A, Resource 0860)  
 Revenue and Expenditures  
 Comparison Report FY 2013/14**

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

	(b)		(a)		(b)	(b)-(a)
	Audited	Adopted	2nd	Unaudited	Interim	
	Actuals	Budget	Interim	Actuals	Budget vs.	
	2012/13	2013/14	2013/14	2013/14	Unaudited	
	as of	as of	as of	as of	Actuals	
	6/30/13	7/1/13	1/31/14	6/30/14	2013/14	
<b>REVENUE</b>	1,701,520	1,728,377	1,743,046	1,755,939		12,893
<b>EXPENDITURES</b>						
Certificated Salaries	537,907	530,295	566,076	587,000		20,924
Classified Salaries	460,609	464,145	490,439	472,272		(18,167)
Employee Benefits	369,929	394,936	399,931	372,712		(27,219)
Books & Supplies	137,200	175,334	173,714	155,980		(17,734)
Equipment	18,533	25,000	26,000	16,322		(9,678)
Unallocated Reserve	0	149,375	73,080	0		(73,080)
Services & Other Operating Expenses	92,227	53,453	63,298	55,296		(8,002)
Indirect Costs	103,288	120,285	120,285	111,690		(8,595)
<b>TOTAL EXPENDITURES</b>	1,719,694	1,912,823	1,912,823	1,771,272		(141,551)
<b>NET INCREASE (DECREASE)</b>	(18,174)	(184,446)	(169,777)	(15,334)		154,443
<b>FUND BALANCE ANALYSIS</b>						
Beginning Fund Balance	555,937	537,763	537,763	537,763		0
Net Increase (Decrease) in Fund Balance	(18,174)	(184,446)	(169,777)	(15,334)		154,443
Ending Fund Balance	537,763	353,317	367,986	522,429		154,443



**INSTRUCTIONAL TECHNOLOGY**  
**(BSEP Measure A, Resource 0862)**  
**OVERVIEW: FY 2013-14**

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**Purpose**

*Providing and maintaining computers and technology in schools.<sup>1</sup>*

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**Budget Manager: Jay Nitschke, Director of Technology**

**Certificated Salaries**

<i>Budget: \$25,358</i>	<i>Actual: \$26,253</i>	<i>Variance: \$895</i>
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- TSA for Instructional Technology            0.33 FTE<sup>2</sup>

**Classified Salaries**

<i>Budget: \$392,829</i>	<i>Actual: \$395,231</i>	<i>Variance: \$2,402</i>
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- Microcomputer Technicians            6.1 FTE<sup>3</sup>
- Student Systems Specialist            0.6 FTE<sup>4</sup>
- Director of Technology            0.2 FTE<sup>5</sup>

**Employee Benefits**

<i>Budget: \$186,770</i>	<i>Actual: \$181,899</i>	<i>Variance: (\$4,871)</i>
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**Materials and Supplies**

<i>Budget: \$ 70,029</i>	<i>Actual: \$ 62,840</i>	<i>Variance: (\$7,189)</i>
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**Equipment**

<i>Budget: 20,000</i>	<i>Actual: 16,861</i>	<i>Variance (\$3,139)</i>
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**Services and Other Operating Expenses**

<i>Budget: \$25,000</i>	<i>Actual: \$0</i>	<i>Variance: (\$25,000)</i>
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**Indirect Costs**

<i>Budget: \$48,981</i>	<i>Actual: \$45,971</i>	<i>Variance: (\$3,010)</i>
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**Fund Balance**

<i>Beginning: \$38,070</i>	<i>Ending: 93,719</i>	<i>Increase: \$55,649</i>
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<sup>1</sup> BSEP Measure A, Section 3C

<sup>2</sup> Multifunded: General fund 0.33, BSEP PD 0.34

<sup>3</sup> The General Fund provided .6 FTE and site contributions provided another 0.1 FTE for a total 6.8 FTE

<sup>4</sup> The General fund provides 0.4 FTE for a total 1.0 FTE

<sup>5</sup> The General fund provides 0.8 FTE for a total 1.0 FTE

## **RESOURCE SUMMARY**

Currently, the amount of money available for technology purchases is quite low (~\$8/student). The cost of staffing support for technology requires most of the BSEP resource. Fortunately, there have recently been additional one-time funds that have provided Chromebooks (FY13-14, 14-15), LCD projectors, and document cameras (FY 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.

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## **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. FY 2013-14 technology staffing continued from FY 2012-13.

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 2013-14, the majority of that money was used to expand the wifi network.

In FY 2013-14, an additional Teacher on Special Assignment position was created through one-time Common Core funds. Additionally over 1000 Chromebooks were purchased during the fiscal year.

A new district working group – DigiTech – melded Technology staff, Library staff, and the Instructional Tech TSAs to focus on integrating technology into the regular school day through using technology. The workgroup, 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 pilot the Smarter Balanced Assessments (SBA) in all classrooms grades 3-9 and grade 11 at BHS.

**BERKELEY UNIFIED SCHOOL DISTRICT  
 BERKELEY SCHOOLS EXCELLENCE PROGRAM (BSEP)  
 TECHNOLOGY (Measure A, Resource 0862)  
 Revenue and Expenditures  
 Comparison Report FY 2013/14**

**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

	(a)	(b)	(b)-(a)		
	Audited Actuals 2012/13 as of 6/30/13	Adopted Budget 2013/14 as of 7/1/13	2nd Interim Budget 2013/14 as of 1/31/14	Unaudited Actuals 2013/14 as of 6/30/14	2nd Interim Budget vs. Unaudited Actuals 2013/14
<b>REVENUE</b>	760,403	772,405	778,960	784,703	5,743
<b>EXPENDITURES</b>					
Certificated Monthly Support Staff	24,566	25,358	25,358	26,253	895
Classified Monthly Support Staff	379,623	397,371	392,829	395,231	2,402
Employee Benefits	184,296	198,753	186,770	181,899	(4,871)
Materials & Supplies	80,701	65,000	70,029	62,840	(7,189)
Unallocated Reserve	0	16,318	4,000	0	(4,000)
Equipment	44,041	0	20,000	16,861	(3,139)
Services & Other Operating Expenses	2,100	25,000	25,000	0	(25,000)
Indirect Costs	45,709	48,981	48,981	45,971	(3,010)
<b>TOTAL EXPENDITURES</b>	761,036	776,781	772,967	729,054	(43,913)
<b>NET INCREASE (DECREASE)</b>	(633)	(4,376)	5,993	55,649	49,656
<b>FUND BALANCE ANALYSIS</b>					
Beginning Fund Balance	38,703	38,070	38,070	38,070	0
Net Increase (Decrease) in Fund Balance	(633)	(4,376)	5,993	55,649	49,656
Ending Fund Balance	38,070	33,694	44,063	93,719	49,656

## **APPENDIX to BSEP ANNUAL REPORT**

### **BSEP Funds 5, 6, 7, 8**

**Budget Managers: Donald Evans, Superintendent**

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

Carryover funds were available for expenditure in FY 2013-14, and funds also remained available for adjustments generated by the Alameda County Tax Collector. There was no new revenue, other than a small amount of interest income and no reductions in prior year revenue from “Teeter Plan” adjustments from the County Tax Collection Office. A financial summary for each Fund is attached and explained as follows:

**BSEP Fund 5** (BSEP Site Enrichment and BSEP Implementation)

There were no expenditures in BSEP Fund 5 in 2013-14. A fund balance of \$11,428 remained at the close of FY 2012-13. Interest income of \$30 increased the fund balance at year-end to **\$11,455**.

**BSEP Fund 6** (BSEP Books and Educational Materials)

In 2012-13, the plan authorized expenditures for technology for the Summer Bridge program at Berkeley High School. Equipment for the program was purchased in FY 2013-14. The beginning fund balance for Fund 6 was \$17,338. After interest income of \$30 and expenditures for the Bridge Program, the end fund balance was **\$6,176**.

**BSEP Fund 7** (BSEP Buildings and Grounds Improvement)

A fund balance of \$1,245 remained in Fund 7 at the close of FY 2012-13. The negative interest erroneously charged to this Fund in FY 2012-13 was corrected by the County Treasurer in FY 2013-14. This correction, plus a small amount of interest income, left an ending fund balance of **\$1,294**.

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

No expenditures were made in FY 2013-14. A fund balance of **\$6,045** remained at the close of FY 2012-13. Combined with interest income of \$14, at the end of FY 2013-14 the fund balance totaled **\$6,059**.

**Financial Summary**  
**Funds 05-08 FY 2013/14**  
**Unaudited Actuals FY 2013/14**

	<b>Fund 5 (a)</b>	<b>Fund 6 (a)</b>	<b>Fund 7 (a)</b>	<b>Fund 8 (b)</b>
<b>Revenue</b>	27	30	50	14
<b>Expenditures</b>				
Books	0	0	0	0
Materials & Supplies	0	11,192	0	0
Equipment	0	0	0	0
Land	0	0	0	0
Buildings and Improvements	0	0	0	0
<b>Total Expenditures</b>	0	11,192	0	0
<b>Net Increase/Decrease</b>	27	(11,162)	50	14
<b>Beginning Fund Balance</b>	11,428	17,338	1,245	6,045
<b>Net Increase/Decrease</b>	27	(11,162)	50	14
<b>Ending Fund Balance</b>	11,455	6,176	1,294	6,059

(a) BSEP Measure B of 1994

(b) Measure B of 2004