

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

**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 2016-17 was \$2,510,600. This allowed for allocations to the sites of \$235 per pupil.<sup>2</sup> The expenditure budget for FY 2016-17 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) or School Site Council (SSC) 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, based on the Unaudited Actuals for 2016-17 as of June 30, 2017.

**Staffing** (76.93% of total actual expenditures)

*Budget: \$2,068,014                    Actual: \$1,914,425                    Variance: (\$153,589)*

- Certificated salaries    \$ 991,002
- Classified salaries     \$ 521,689
- Employee benefits     \$ 401,734

**Books and Supplies, and Unallocated Funds** (6.16% of total actual expenditures)

*Budget: \$238,302                    Actual: \$153,170                    Variance: (\$85,132)*

**Contracted Services** (10.89% of total actual expenditures)

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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 prior-year enrollment. For Independent Study, Berkeley Technology Academy (BTA) and Early Childhood Development, the allocation is based on an agreed-upon average enrollment. Independent Study enrollment is deducted from Berkeley High's CALPADS enrollment. For FY 2016-17, the adjusted enrollment was 10,359 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 FY 2016-17, the unspent balance from the prior year of \$480,805 was posted as carryover, along with the associated Indirect Cost, once the books were closed in September.

**BSEP ANNUAL REPORT: FY 2016-17**

*Budget: \$285,672                      Actual: \$270,921                      Variance: (\$14,751)*

**Indirect Costs** (6.02% of total expenditures)

*Budget: \$186,863                      Actual: \$149,899                      Variance (\$36,964)*

**Fund Balance**

*Beginning: \$676,497                      Ending: \$722,478                      Increase: \$45,981*

**RESOURCE SUMMARY:**

In FY 2016-17, the per-pupil allocation was increased to \$235, an increase of about 2.2% from the \$230 provided in the previous two years. At Berkeley High, enrollment fell by 1.85%, but the increased per pupil allocation helped maintain a similar level of program funding. Middle school enrollment increased by 4% over the previous year, as a larger 5th grade cohort moved up from 2,028 to 2,109. The elementary school enrollment remained essentially flat from 4,468 to 4,484, which meant that the increased per-pupil funding from BSEP provided a significant boost to discretionary funds for 2016-17. Berkeley Technology Academy (BTA) and Berkeley Independent Study (BIS) both received a flat allocation based on 150 students, although student populations in those programs typically fluctuate throughout the academic year, and at BTA the enrollment has not approached 150 in recent years.

At the end of FY 2016-17, most sites had unexpended funds in their BSEP Site Discretionary budgets, though that amount varied widely. On average, elementary sites expended 77.5% of their overall budgets (including carryover funds), ranging from a low of 56.42% to a high of 97.77%. In almost all cases, unexpended funds remained in materials and supplies budgets. In some cases, hourly budgets were not fully expended. Middle schools expended an average of 86.46% of their total budgets for the year. Berkeley High expended 85.57% of its allocated budget, in part reflecting the set-aside for personnel variance. BIS expended 58.92% of its allocated budget while BTA expended 87.13% of its allocated budget. ECE expended 53.96% of its budget. All allocated BSEP School Site Discretionary dollars that were unspent at the end of FY 2016-17 were carried over to the site budgets for expenditure in FY 2017-18, as under the new measure, the purpose of Site Discretionary Funds remained consistent. Site budgets will therefore draw upon both Measure A and Measure E1 funds to achieve site plan goals.

**STATUS REPORT**

School Site Discretionary funds continued to provide a broad variety of programs for students, with each site’s plan reflecting the needs and priorities of the school. BSEP site funds are frequently used for student support, enrichment activities, and instructional materials.

Significant resources (76.93% of total expenses) go to funding certificated (49.72%) and classified (27.21%) staff. Every elementary school uses site funds to partially fund a Literacy Coach. Other certificated positions partially funded by BSEP site funds at elementary sites include Response to Intervention (RtI) teachers/coordinators, ELD teachers, a Reading Intervention teacher, a Math Intervention teacher, a Math Coach, a Technology teacher, Dance, Art and Music teachers, and Counselors.

## BSEP ANNUAL REPORT: FY 2016-17

Classified positions funded through discretionary funds at both elementary and secondary levels included Instructional Assistants (IAs) to support classroom teachers, Instructional Specialists for Dance, Drama, PE, and Athletics, a School Service Assistant, and increased FTE for a Library Media Tech. These expenditures also include certificated and classified hourly work for intervention and tutoring, as well as for staff collaboration and professional development.

The next largest area of expenditure, at 10.89% of the total budget, was for contracted services. Many sites contracted for counseling services, professional development, PE services, enrichment contracts, mentoring and tutoring services, and one writing coach. BHS contracted for music coaching and the R.I.S.E. Scholar program, while BIS funded a contract for Occupational Therapy Training. These funds also covered field trip admissions at several sites.

BSEP site funds continue to be an important resource for instructional materials, constituting 6.2% of the total expenditures to pay for books, materials, supplies and equipment. These expenditures totaled \$153,170.

The Berkeley High budget supported a broad spectrum of programs, including College and Career Advising, Academic Support Services, Student Welfare and Attendance, and an ELL Intervention Program, as well as funding a Volunteer Coordinator and staff to run an African/Haitian Drum course. At Berkeley Technology Academy (BTA), site funds contributed support of 0.42 FTE for the full-time Student Welfare and Attendance Specialist, while in the Independent Study Program (BIS), site funds provided hourly tutoring and mentoring, gardening program support, certificated hourly instruction, an occupational therapy training contract, certificated hourly for curriculum development, and instructional materials.

While site plans vary from site to site, and vary considerably between primary and secondary sites, activities supported by BSEP discretionary funds all served to further the District goals of improving academic achievement and promoting student success.