

## **BERKELEY UNIFIED SCHOOL DISTRICT**

**TO:** BSEP Planning and Oversight Committee  
**FROM:** Brent Stephens, Superintendent and  
Bajé Thiara, Associate Superintendent for Educational Service  
**DATE:** February 11, 2020  
**SUBJECT:** Recommendation for Expenditure of BSEP Funds for Class Size  
Reduction and Support for Teaching in FY 2020-21

### **BACKGROUND INFORMATION**

According to Measure E1 of 2016, “sixty-six percent (66%) of the Available Revenues shall be dedicated annually to reducing class sizes at all District-operated K-12 schools, and may also be allocated to provide funding for professional development, classroom support, program evaluation, and expanded course offerings.”<sup>1</sup>

### **Class Size Reduction and the Teacher Template**

The contribution of BSEP Class Size Reduction (CSR) Funds for classroom teachers is estimated using a planning tool known as the “Teacher Template” . The Teacher Template calculates student enrollment and staffing for class size ratios to be paid for by General Fund (GF) resources, and then calculates additional staffing to be paid for by BSEP funds to determine the total number of teacher staffing, expressed as Full Time Equivalent (FTE).

In 2019-20, a \$2.0 million cut target drove a search for reductions in costs, increases in revenues, and alternative funding sources. Nearly 10% of that goal was met by increasing the amount transferred to the General Fund from BSEP through a revised calculation of “Direct Support” costs, which are permitted under the terms of Measure E1 as “costs associated with the opening or maintaining of classrooms to reduce class sizes.”

For 2020-21, continuing pressures on the General Fund are driving the recommendation to adjust the relative contributions of the GF and BSEP to the class size reduction calculation, so that for K-5 grades, the GF will support staffing ratios at 36:1 (instead of 34:1), and BSEP will provide the funds to bring the class sizes down to the specified targets. Class sizes will not be affected; the BSEP funds will be assuming a greater share of the FTE required to achieve targeted class sizes.

The annotated Teacher Template shows how class size goals are calculated for 2020-21 compared to 2019-20. The key factors which go into this calculation are: enrollment, class size targets, GF/BSEP contribution, rounding factors,

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<sup>1</sup> BSEP Measure E1 of 2016, Section 3.A

and average teacher costs. Together the increased charge to BSEP over the prior year is estimated at about \$1.2M.

### **PROGRAM SUMMARY - Support for Teaching**

In addition to the Class Size Reduction goal, which is achieved through the aforementioned transfer of funds from BSEP to the General Fund, this resource supports a number of expenses in support of high quality instruction, as permitted by the Measure. These expenses, under the rubric of “Support for Teaching”, may include Professional Development, Program Evaluation, Expanded Course Offerings, and Classroom Support. Unlike the “teacher transfer” which is calculated at the end of the year, these expenses are “directly charged” at the time the actual costs for the programs are incurred.

### **Professional Development**

The Professional Development (PD) Department works to build and sustain teacher capacity. With the arrival of the Common Core State Standards, as well as the Next Generation Science Standards (NGSS), professional learning efforts in math, literacy, and science have required deep investments as well as intensive and expansive coordination. The District’s PD Coordinator oversees and coordinates professional learning in all core subject areas at district-wide events, and at teacher-led Wednesday staff meetings throughout BUSD.

In addition, the PD funds support the development of professional learning community (PLC) work and protocols at all levels of the District. A particularly important support funded through this budget is the district’s K-5 Lead Literacy Coach who both supports students and supports the teachers working with students who face the largest and most pronounced literacy challenges. At Berkeley High, the budget also forms the core of a teacher-led professional development team that works on curriculum as well as culturally-responsive teaching.

The detailed Professional Development plan for 2020-21 will be presented at the 2/25/2020 BSEP P&O Meeting. It is expected that there will be additional costs proposed for this budget over 19-20.

### **Program Evaluation**

As the District implements numerous educational programs designed to improve student achievement, staff must be able to assess the effectiveness of these programs in meeting their goals. Equity-driven and data-driven decision-making is critical to student success, and therefore, the District established the Berkeley Research, Evaluation, and Assessment (BREA) office to provide needed expertise.

BREA’s evaluations improve the ability of the School Board, staff, School Site

Councils (SSCs) and the public to make informed decisions about the effectiveness of programs in order to maximize the use of resources to meet the needs of students, and in particular our most underserved students. BREa develops and maintains a central data warehouse of district and state mandated assessments which may be analyzed at the site, classroom, case-management or student levels to identify students who should be engaged through the intervention model. In addition, BREa teams with the Professional Development staff to support the development of data reporting systems across a range of program needs and works with the Office of Family Engagement and Equity in their efforts to document family and student engagement efforts.

In 2018-19, as part of the \$1.8 million cut target to sustain the central budget, this budget eliminated the position of Director of Research and Evaluation and also reduced discretionary expenditures for stipends and workshops by about \$36,500. The Associate Superintendent took on the responsibility for oversight of this department, with some additional TSA staffing provided more support for sites and programs during this transition.

In 2019-20, the position of Director of Programs and Special Projects was eliminated, with additional workload for the position falling upon the Associate Superintendent, and the Director of K-8 Schools, with increased demands for support of the LCAP-associated work of the BREa department. The 2019-20 budget includes .4 FTE for a BREa coordinator, co-funded with .6 FTE from LCAP.

Currently, BREa staffing for the 2020-2021 school year is contemplated as one administrator, two staff members (TSA's or classified analysts), and one administrative assistant. Additional funding for additional program evaluation projects may also be proposed. A detailed budget for Evaluation and Assessment will be presented to the Planning and Oversight Committee on 2/25/20.

### **Expanded Course Offerings (ECO)**

This funding provides Middle and High School students with a wide variety of options for before-school and after-school elective and enrichment classes that are not available within the master schedule. For example, ECO classes at Berkeley High include Advanced Placement (AP) augmentation classes, providing access to AP coursework for students who might not otherwise have such access, as well as AVID class, science labs, yearbook and music. The 2020-21 proposal will come to the P&O Committee on 2/25.

Currently, BSEP provides 7.6 FTE, as follows:

- 0.4 FTE Longfellow Middle School
- 0.4 FTE Willard Middle School
- 0.8 FTE King Middle School

- 6.0 FTE Berkeley High School

### **Classroom Support**

This resource may provide additional FTE for special programs in need of support beyond that provided through the Teacher Template calculation.

#### U9 Support 5.0 FTE

With the inception of the Universal 9th Grade program at BHS, additional FTE was needed to provide more individualized attention as the students transition into high school. In 2018-19, BSEP took on 2.0 FTE of the needed 5.6 FTE, with the remainder provided by LCAP and the General Fund. In 2019-20, the BSEP portion of the FTE was increased to 5.0 FTE, to relieve the General Fund during a period of budget reductions.

#### TWI Support: 0.6 FTE

At Sylvia Mendez Elementary School, an additional 0.6 FTE is provided for a teacher who provides small group supports to help manage a gap in proficiency in a student's home language while also trying to grow their skills in a second language. The small group intensive reading and writing groups helps equalize the challenges of kids and families in dual language instruction, providing support for students who are struggling academically in general and who did not have the advantage of bilingual preschools or other preparations. Without this support, the TWI program could become a very stratified program that best serves only those who already have tremendous educational and cultural advantages.

#### International Baccalaureate Support: 0.4 FTE

In 2019-20, as part of the reductions to costs in the General Fund, BSEP took on partial funding for the 1.0 position of International Baccalaureate Coordinator at Berkeley High School. The IB Coordinator is responsible for alignment of the IB curriculum and pedagogy, staff training and support, IB assessment, components of the IB program, including the Extended Essay and the *Creativity, Action, Service* project. The Coordinator ensures compliance with all programmatic requirements of the International Baccalaureate Organization, and also facilitates family and student engagement for the 360 students enrolled in IB courses.

#### Support for Students with Disabilities 5.0 FTE

This addition to the BSEP HQI budget will permit the district to provide additional support for students with disabilities. First, three new Special Education teachers will be assigned from the Special Education department each year to provide case management and Specialized Academic Instruction (SAI) for students with IEPs in the schools with the highest average caseloads. Two of these teachers will work at the elementary level and one will be assigned to the middle school level. The remaining two teachers, of the five new teachers

in total, will be deployed from the Special Education department to support Special Education assessments, with a particular focus on the completion of initial assessments. By providing this relief from caseload size and assessment, Special Education teachers will have more time to focus on classroom instruction and support, thereby bolstering the district's ongoing commitment to the tenets of Least Restrictive Environment and full inclusion.

### **Budget Summary for High Quality Instruction 2019-20 BSEP Measure E1, Resource 0741**

Since the inception of BSEP Measure E1, the BSEP resource for High Quality instruction, under the subsection of Support for Teaching and Learning, has taken on the funding of an additional 4.0 FTE in 2018-19, another 4.4 FTE in 2019-20, and at least another 5.0 FTE in 2020-21, for a total of 13.4 FTE in ongoing costs added since the inception of the BSEP E1 Measure. In addition, the Direct Support recalculation is providing a nearly \$200,000 increase in the transfer from BSEP to the General Fund, and the adjustment of the GF/BSEP contributions to Class Size are providing additional cost reductions to the GF while maintaining the promised class size targets.

These costs are being supported through the additional revenues provided through the Measure E1 special tax. COLA increases of 2.9% and 4.5%, in the second and third years of the Measure kept pace with costs, and with reductions in expenditures in the General Fund needed, these adjustments appear to be reasonable and sustainable. For 2020-21 however, a 2.5% COLA does not keep pace with rising costs, and the fund balance will be drawn down. Should revenues flatten in later years, and/or costs increase substantially, it may be necessary to adjust the added FTE and/or recalibrate the allocation of costs between the BSEP funds and other sources such as the General Fund.

It should also be noted that for 2020-21, the amount of FTE being charged to BSEP for elementary school teachers (based on the Teacher Transfer) is likely to be lower than in future years, as we are still in the transition from the class size goals of Measure A to those of Measure E1, which means that there are larger 4th and 5th grade classes currently, requiring fewer teachers for those grades. We expect additional FTE to be necessary as class sizes for those grades decrease in the next two years. We also need to consider the possibility of enrollment growth requiring additional FTE, should BUSD experience an influx of students, as occurred in the mid years of Measure A during the great recession.

An initial budget for this resource begins with the proposed costs of the Teacher Template transfers to the General Fund to achieve the class size reduction targets. In addition, as a first draft for discussion with the Planning and Oversight Committee, placeholder amounts for the discretionary

expenditures funded through this budget, including Expanded Course Offerings, Professional Development, Program Evaluation and Classroom Support, will be provided on 2/11/20, along with an overview of further items for consideration, with more fully described plans provided on 2/25/20.

**Budget Summary for High Quality Instruction 2020-21  
Measure E1, Resource 0741**

<b>Revenue</b>	\$ 20,941,400
<b>Transfers</b>	
Teacher Compensation	\$ (14,533,500)
Direct Support	\$ (573,600)
Sub Compensation	\$ (257,600)
<b>Total Transfers to the General Fund</b>	\$ (15,364,700)
<b>Net Revenue</b>	\$ 5,576,700
<b>Directly Charged Expense</b>	
Professional Development	\$ 1,810,900
Program Evaluation	\$ 544,100
ECO	\$ 809,600
Classroom Support	\$ 1,191,800
Unallocated Reserve	\$ 425,000
<b>Total Directly Charged Expense</b>	\$ 4,781,400
<b>Indirect Cost (5.25%)</b>	\$ 1,057,670
<b>Total Expense</b>	\$ 5,839,070
<b>Total Transfers and Expense</b>	\$ 21,203,770
<b>Revenue Less Transfers and Expense</b>	\$ (262,370)
<b>Beginning Fund Balance</b>	\$ 4,528,733
Net Increase/(Decrease) in Fund Balance	\$ (262,370)
<b>Ending Fund Balance</b>	4,266,363