

SCHOOL SITE PROGRAMS

BSEP Measure E1, Resource 0752

BSEP Measure A, Resource 0852

ANNUAL REPORT: FY 2019-20

UPDATE: FY 2020-21

Measure E1 Purpose

Personnel, services and materials to deliver effective and equitable opportunities for student engagement, enrichment, and achievement. Available Revenues may be used for, but are not restricted to...such programs as art and science instruction, academic tutoring and counseling, athletics and student activities, and before and after school programs.¹

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

The budgeted revenue allocated to the BSEP Site Program funds in FY 2019-20 was \$3,015,950. This allowed for allocations to the sites of \$285 per pupil.²

Each 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 Program funds were utilized across the district to support the School Plans, based on the Unaudited Actuals for 2019-20.

The expenditure budget for each site for FY 2019-20 was based on this revenue allocation, added to any carryover generated by unspent balances for each site.³ It is important to bear in mind that while BSEP site funds work in concert with other resources such as PTA, Title 1, and grant monies to fund the complete picture of discretionary programs at each site, this document only summarizes BSEP budgets and expenditures.

RESOURCE SUMMARY:

In FY 2019-20, the BSEP Site Program allocation of \$285 per-pupil was based as always on the site enrollment as reported in the State CalPADS system. An exception to this calculation is the provision of funds to Berkeley Technology Academy (BTA), which continued to receive its allocation based on an assumption of 150 students, despite its average attendance being much lower. The allocation for Berkeley Independent Study (BIS) was also based on an average of 150 students, which is closer to the actual average enrollment. The ECE (Preschool) allocation assumed 300 students, a calculation based on the number of full and partial day students across three sites.

¹ BSEP Measure E1 Section 3.B.iii

² Revenue is allocated to each school site based on prior-year enrollment. For Independent Study, Berkeley Technology Academy, and Early Childhood Education, the allocation is based on an agreed-upon average.

³ The Fund Balance consists of monies that are held centrally, as well as unspent balances (carryover) from the prior year. Unspent balances include the difference between the budget allocated to each site and actual expenditures.

The \$285 per pupil allocation was an increase of 9.6% from the previous year. The increase was made possible by the growth in the fund balance from increased COLAs in both 2018-19 and 2019-20. The four largest areas of expenditure from BSEP Site Program Funds (both Measures A and E1 combined) were:

1. Staffing (80.51% of total actual expenditures)

<i>Budget:</i> \$2,684,828	<i>Actual:</i> \$2,492,993	<i>Variance:</i> (\$191,835)
● Certificated Staffing	\$ 1,443,567	
● Classified Staffing	\$ 495,282	
● Employee Benefits	\$ 554,144	

2. Contracted Services (8.87% of total actual expenditures)

<i>Budget:</i> \$397,056	<i>Actual:</i> \$274,739	<i>Variance:</i> (\$122,317)
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3. Books, Supplies and Equipment (5.58% of total actual expenditures)

<i>Budget:</i> \$289,533	<i>Actual:</i> \$172,762	<i>Variance:</i> (\$116,771)
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4. Indirect Costs (5.03% of total expenditures)

<i>Budget:</i> \$200,096	<i>Actual:</i> \$155,842	<i>Variance:</i> (\$44,254)
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All unspent BSEP Measure E1 Site Program dollars from 2019-20 were carried over to 2020-21 budgets. Under both Measures A and E1 the purpose of Site Funds remains consistent, and site budgets may draw upon both Measure A and Measure E1 carryover funds until they are completely expended. Expenses at the end of 2018-19 were allocated such that only Berkeley High has any Site Program funds remaining from BSEP Measure A. In 2019-20, the other 17 schools and programs were only using Site Program funds from the current BSEP Measure E1, saving a large amount of tracking and logistical work for those Principals.

STATUS REPORT

In the 2019-20 school year, BSEP site funds were expended almost entirely in line with previous years; a remarkable feat considering the school closure in March 2020. Overall, in three of the four categories listed above (Staffing, Contracted Services, Books/Supplies/Equipment, and Indirect Costs) the variances between the 2nd Interim Budget and the Unaudited Actuals were lower than those from the previous school year (2018-19). This consistency can be credited in large part to the District’s commitment to maintain funding for all staff positions and honor all existing contracts at the time of the school closure.

The one area in which that variance increased from the previous year was for Contracted Services. Though all contracts already in place in March were paid in full, other planned contracts for services from March through June were never initiated, and so the expense wasn’t realized. Examples of contracts that were not set up due to the pandemic include assembly presentations, field trip admissions, funds to pay for non-BUSD transportation, a small PD

mid-March 2020. Note that only the Site Plan Addendum from Berkeley Technology Academy was implemented after the school closures in March 2020; the remaining addenda were created by their respective SSCs between November 2019 and February 2020.

Update FY 2020-21:

Site fund allocations jumped from \$285 per pupil in 2019-20 to \$305 per pupil in 2020-21, thanks to increased BSEP revenues. The increase in BSEP site funding was a particular boon for the 7 schools that saw reductions in their Title I allocations this year. Additionally, most PTAs are seeing a drastic decrease in fundraising revenues due to the pandemic. Many BUSD schools are faced with ongoing budgeting challenges that influence how BSEP site funds are allocated.

Overall, the 2020-21 BSEP site budgets contain relatively few Carryover Priorities, because SSCs and Principals didn't feel last Spring that they could predict their schools' future needs with so much about the pandemic still unknown. So far in 2020-21, the following Site Plan Addenda have been submitted to adjust schools' use of BSEP site funds through this most unusual year:

- Longfellow has designated \$10,000 of its unallocated carryover site funds to support an additional section of 8th grade math (combined with Title I funding).
- The Early Childhood Education Program shifted \$3,000 originally allocated for field trip transportation costs into a materials and supplies budget to prepare for eventual in-person learning.
- Sylvia Mendez allocated \$31,092 of unallocated carryover site funds to fund .3 FTE for a math TSA position, removing that expense from its PTA budget in light of the ongoing fundraising challenges.
- Jefferson (afterwards renamed Ruth Acty) allocated \$10,500 for teacher hourly work around curriculum and professional development, plus \$4,000 for classified hourly tutoring. These funds had previously been designated to pay for teacher subs and hourly teaching.

**BERKELEY UNIFIED SCHOOL DISTRICT
 BERKELEY SCHOOLS EXCELLENCE PROGRAM (BSEP)
 SCHOOL SITE PROGRAMS (Measure E1, Resource 0752)
 Revenue and Expenditures
 Comparison Report FY 2019-20**

Mission Statement

Ten and a quarter percent (10.25%) of the available revenues shall be *allocated annually for School Site Programs 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 Site Council (as described in Section 8.C.) shall develop recommendations to allocate these revenues for the personnel, services and materials required to deliver effective and equitable opportunities for student engagement, enrichment, and achievement. Available Revenues may be used for, but are not restricted to, the personnel, materials and services required to deliver such programs as art and science instruction, academic tutoring and counseling, athletics and student activities, and before and after school programs.*

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

	Unaudited Actuals 2018/19 As of 6/30/19	Adopted Budget 2019/20 As of 7/1/19	2nd Interim Budget 2019/20 As of 1/31/20	Unaudited Actuals 2019/20 As of 6/30/20	2nd Interim Budget vs. Unaudited Actuals 2019/20
REVENUE	3,113,685	3,176,097	3,179,443	3,200,411	20,968 (1)
EXPENDITURES					
Certificated Salaries	1,198,959	1,334,959	1,525,093	1,443,567	(81,526)
Classified Salaries	400,776	397,944	544,153	495,282	(48,871)
Employee Benefits	424,457	652,911	615,582	554,144	(61,438)
Books & Supplies	93,739	80,840	280,482	168,721	(111,761)
Equipment	2,814	5,000	5,610	600	(5,010)
Unallocated Reserve and Carryover	0	238,459	383,179	0	(383,179)
Contracted Services	161,012	246,007	397,056	274,739	(122,317)
Indirect Costs	135,308	156,970	199,913	155,659	(44,254)
TOTAL EXPENDITURES	<u>2,417,065</u>	<u>3,113,090</u>	<u>3,951,068</u>	<u>3,092,712</u>	<u>(858,356)</u>
NET INCREASE (DECREASE)	696,620	63,007	(771,625)	107,699	879,324
FUND BALANCE ANALYSIS					
Beginning Fund Balance	557,321	1,253,941	1,253,941	1,253,941	0
Net Increase (Decrease) in Fund Balance	696,620	63,007	(771,625)	107,699	879,324
Ending Fund Balance	1,253,941	1,316,948	482,316	1,361,640	879,324

Notes

(1) Revenue is allocated to each school site based on the projected number of students for the year (CALPADS data). The projection is adjusted for Berkeley Independent Study (BIS), Berkeley Technology Academy (BTA) and Early Childhood Development. BIS and BTA received funding based on 150 students. Early Childhood received funding based on 300 students. In FY 2019-20, adjusted enrollment was 10,324.

**BERKELEY UNIFIED SCHOOL DISTRICT
 BERKELEY SCHOOLS EXCELLENCE PROGRAM (BSEP)
 SCHOOL SITE DISCRETIONARY PROGRAM (Measure A, Resource 0852)
 Revenue and Expenditures
 Comparison Report FY 2019-20**

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
 Danielle Perez, BSEP Program Specialist

	Unaudited Actuals 2018/19 As of 6/30/19	Adopted Budget 2019/20 As of 7/1/19	2nd Interim Budget 2019/20 As of 1/31/20	Unaudited Actuals 2019/20 As of 6/30/20	2nd Interim Budget 2019/20 As of 6/30/20
REVENUE					
Revenue	0	0	0	0	0
Contribution (To)/From Measure A Reserve	(2,009)	0	0	(5,023)	(5,023)
Net Revenue	(2,009)	0	0	(5,023)	(5,023)
EXPENDITURES					
Certificated Salaries	71,957	0	0	0	0
Classified Salaries	20,886	0	0	0	0
Employee Benefits	26,840	0	0	0	0
Books & Supplies	86,430	0	3,441	3,441	0
Equipment	4,791	0	0	0	0
Unallocated Reserve and Carryover	0	0	0	0	0
Contracted Services	81,533	0	0	0	0
Indirect Costs	17,341	0	183	183	0
TOTAL EXPENDITURES	309,778	0	3,624	3,624	0
NET INCREASE (DECREASE)	(311,787)	0	(3,624)	(8,647)	(5,023)
FUND BALANCE ANALYSIS					
Beginning Fund Balance	507,935	196,147	196,147	196,147	(5,023)
Net Increase (Decrease) in Fund Balance	(311,787)	0	(3,624)	(8,647)	(10,046)
Ending Fund Balance	196,148	196,147	192,523	187,500	(5,023)

Notes

- (1) Contribution to the Measure A reserve Resource transferred at closing