



# 2024-25 P&O Meeting Scheduling and Sequencing

Planning and Oversight Meeting  
5/14/24

# Our Mission

Enable and inspire our diverse student body to achieve academic excellence and make positive contributions to our world.

*Excellence*

*Equity*

*Engagement*

*Enrichment*





# Planning and Oversight Committee

**P&O - 24 members/24 alternates: Elected by each school's School Site Council (SSC) per measure language:**

“A district-wide Planning and Oversight Committee, composed of parents/guardians, staff members, students, residents, or community members representing all school sites and designated programs, shall be established to be advisory to the District, and, in accordance with bylaws adopted by the Board, shall:

- present recommendations to the Board about the annual expenditure plans for the revenues generated by this Measure;
- provide communication among school sites to enhance their effective use of the revenues provided by this Measure; (BSEP)
- and review district compliance with the terms of this Measure.”

## **Board of Education**

- Approves/Amends Yearly Plans and Accepts Reports

# Required Items for the P&O

ENRICHMENT

ENGAGEMENT

EQUITY

EXCELLENCE

**Per Bylaws:** meet no less than 6 times annually (In 2023-24 there were 15 P&O Meetings)

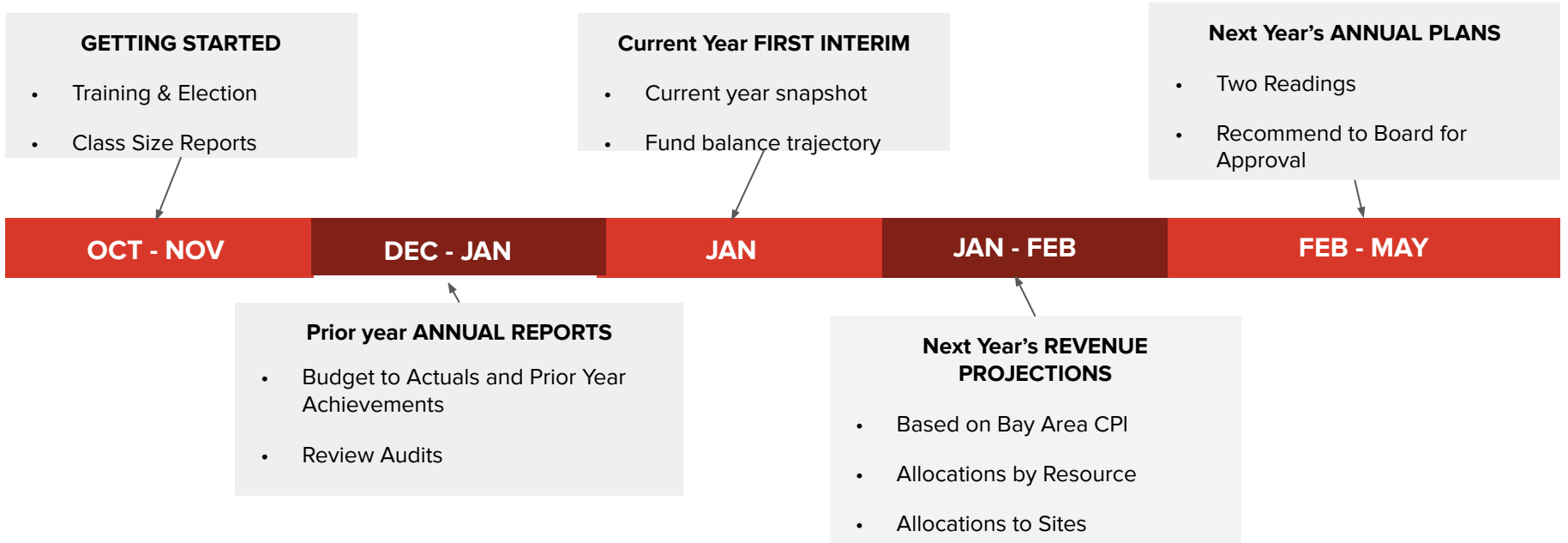
## Per Measure:

- Allocations among programs shall be recommended by district staff to the Planning and Oversight Committee and approved by the Board.
- The District shall make available to the Planning and Oversight Committee and the general public, updated revenue and expenditure reports of the proceeds of this Special Tax at least four times annually:
  - Before adoption of the District's annual budget (Annual Plans)
  - Two State-required interim reports (1st and 2nd Interim Report)
  - Annual report on the Measure (Annual Report)
- The Annual Report shall display:
  - Revenues generated by the Measure and the expenditures of the revenues
  - Status of projects
  - Including project metrics\*

The Annual Report shall be delivered to the Planning and Oversight Committee no later than February 15\* following the closing of the fiscal year. The Planning and Oversight Committee shall review the Annual Report and report to the Board on the District's compliance with the conditions of this Measure by March 15\* following the closing of the fiscal year.

\*Measure H: Begins in 2025-26

# Current P&O Calendar



# Improving the Review and Approval Process for Required Items

## **Current challenges:**

- The year starts with looking in the past back (for a large portion of the year)
- Newer members need more basic information on programs
- The work for the coming year's annual plans gets delayed

## **Goals for improvement :**

- Measure requirements to be met
- Members to receive updated and comprehensive program information early in the year
- Members are better informed for the work of reviewing of the annual plans
- Reductions of time spent on annual reports and increase time spent on the coming year's annual plans

	Sept	Oct	Nov	Dec	Jan	Feb	Mar	Apr	May	June
2023-24	<p>Prior Year Comm. - Meet as needed</p> <p>BSEP Measure Development</p>	District Wide Orientation	<p>-Elections</p> <p>-P&amp;O Orientation</p> <p>-Plan changes</p>	<p>Annual Reports Two Readings</p> <p>Audits</p>	<p>Annual Reports Two Readings</p> <p>1st Interim</p>	<p>Annual Reports Two Readings</p> <p>Annual Plans</p>	<p>Annual Reports Two Readings</p> <p>Annual Plans</p>	<p>Board Info Item - Consolidated Annual Plans</p> <p>2nd Interim</p> <p>Annual Plans</p>	<p>Annual Plans</p> <p>Board Approval of Annual Plans</p>	Committee to meet as needed
<p>Proposed for 2024-25</p> <p>Changes: Program Overviews combined with Annual Report</p> <p>Basic Program information</p> <p>Status of Projects</p> <p>Rev &amp; Exp Report</p> <p>Metric updates</p> <p>Request for follow up information</p>	Prior Year Committee to meet as needed	District Wide Orientation	<p>-Elections</p> <p>-General P&amp;O Orientation (additional orientation sessions offered throughout the year per request)</p> <p>-Plan changes</p> <p>Program Overviews and Annual Report</p>	<p>Program Overviews and Annual Report</p> <p>Audits</p>	<p>Program Overviews and Annual Report</p> <p>1st Interim</p> <p>Annual Plans</p>	<p>Program Overviews and Annual Report</p> <p>No later than February 15</p> <p>Annual Plans</p>	<p>For P&amp;O Action: Consolidated Annual Plans</p> <p>By March 15 Board Info Item - Consolidated Annual Plans</p> <p>Annual Plans</p>	<p>2nd Interim</p> <p>Annual Plans</p>	<p>Annual Plans</p> <p>Board Approval of Annual Plans</p>	Committee to meet as needed

# BSEP ★ Excellence!

Berkeley Schools Excellence Program (BSEP)



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