

BSEP Planning and Oversight Committee
Natasha Beery, Director of BSEP and Community Relations
December 11, 2013

The attached Annual Report displays the revenue and expenditures of each Resource of Fund 4 at the closing of Fiscal Year (FY) 2012-13, as well as a brief description of the status of projects funded through BSEP.

V-B. Parcel Tax and Bond Revenues: Provide the best possible education for all students by effectively utilizing local parcel tax and bond revenues.

Berkeley Public Schools Educational Excellence Act of 2006 (Measure A)
Berkeley Public Schools Educational Excellence Act of 1994 (Measure B)

In FY 2012/13, BSEP Measure A of 2006 provided 20% of the District's combined General Fund revenue, in the amount of \$23,904,119. In addition, carryover funds from BSEP Measure B of 1994 accounted for \$69,645 in expenditures.

Review and accept the annual report of 2012-13 BSEP Revenue and Expenditures from Measure A of 2006, and BSEP Measures B of 1994.

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 2006.¹

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 measure². 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 2011-12, compared to the FY 2012-13 budget (revised at second interim, January 31 2013), the (unaudited) actuals as of June 30, 2013, 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. Each BSEP resource is charged for Indirect Costs. The Indirect Cost rate in FY2012/13 was 6.39% and is calculated by a formula determined by the State. The rate is applied to all expenses and transfers and totaled \$1,444,558. 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

	Res	%	Budget	(1) Calculated Actuals	(2) Unaudited Actuals as of 6/30/12	Variance
Revenue						
County Tax Collections			24,250,000	24,392,199		
City of Berkeley Tax Collections			100,000	211,865		
Rebates/Reduction in PY Receivable			(75,000)	(75,500)		
Interest			40,000	14,337		
Total Projected Revenue			24,315,000	24,542,901		
Expenses						
County Collection Fees			412,250	411,018		
City of Berkeley Fees			50,000	48,400		
Misc. Expense			0	0		
Audit and Legal Expense			6,000	4,840		
Total Expenses			468,250	464,258		
Net Revenue			23,846,750	24,078,643		

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

OVERVIEW

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.¹

**Budget Managers: Javetta Cleveland and Neil Smith
Interim Co-Superintendents (FY 2012-13)**

REVENUE TRANSFERS TO THE GENERAL FUND²

	<u>Budget</u>	<u>Actual</u>	<u>Variance</u>
Certificated Counselor Salaries (4.8 FTE)	381,808	378,281	(3,527)
Employee Benefits	725,312	576,992	(148,320)
Indirect Costs	950,129	955,205	(5,076)
	<u>Beginning</u>	<u>Ending</u>	<u>Variance</u>
Fund Balance	1,315,750	901,809	(413,941)

RESOURCE SUMMARY:

As with other BSEP Resources, the General Fund paid for the increased cost of employees for the directly charged salaries, amounting to approximately \$132,500 for this resource. The transfers to the General Fund from 0841 (CSR) were increased by the average teacher cost based on the bonus and increased salaries. This meant an increase of about \$465,000 to the CSR fund. The transfer of costs to the General Fund for part of the ULSS/RtI expense also offset some of the deficit spending in this resource, but the overall trend at this point is toward deficit spending, with significant reduction of the fund balance this year.

STATUS REPORT

The BSEP Class Size Reduction (CSR) funds allowed for the funding of 127.46 FTE for classroom teachers. This represents over 30% of the teaching staff in the district. Class size reduction goals, as specified in the Measure, were met in FY 2012-

	(a)	(b)	(b)-(a)
Audited			
Actuals	Adopted	2nd Inter04 3T04 311.04 309.-)	
2011/12	Budget		
as of	2012/13 as of		
6/30/12	7/1/12		

SCHOOL SITE DISCRETIONARY PROGRAMS

(BSEP Measure A, Resource 0852)

OVERVIEW

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 programs¹

Budget Manager: **Natasha Beery, Director of BSEP and Community Relations, with Mary Hurlbert and Valerie Tay, BSEP Program Specialists**

The budgeted revenue allocated to the BSEP School Discretionary program in FY 2012-13 was \$2,395,406.² The expenditure budget of \$2,892,425 was funded by this new revenue and part of the School Discretionary Fund Balance³, allowing for allocations to the sites of \$233 per pupil. In addition, most sites had budget savings⁴ from FY 2011-12 that carried over and were available for expenditure in FY 2012-13.

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 (70.6% of total actual expenditures)

Budget: \$1,871,994 Actual: \$1,657,258 Variance: 214,736

Certificated salaries	\$ 698,439
Classified salaries	\$ 588,156
Employee benefits	\$ 370,663

¹ BSEP Measure A, Section 3.B.i

² 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, B-Tech 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 2012-13, the adjusted projected enrollment was 9,714 students.

³ The **Fund Balance** consists of monies that are held centrally, as well as unspent balances from the prior year. The Fund Balance may be held in reserve for future needs, or may be allocated to the sites for their use. The ending Fund Balance from FY 2011-12 totaled \$551,659. \$9,714 of this fund balance was allocated to sites in the budget process, and \$444,438 was posted in FY 2012/13 as carryover once the books were closed. The fund balance was reduced when indirect costs of \$28,400 associated with carryover, were posted in FY 2012/13. The net effect was to use \$482,552 of the fund balance in FY 2012/13.

⁴ **Budget savings**

Books and Supplies (11.9% of total expenditures)

Budget: \$468,936 *Actual:* \$279,532 *Variance:* (189,404)

Contracted Services (11.5% of total expenditures)

Budget: 326,679 *Actual:* \$269,863 *Variance:* (56,816)

Indirect Costs

Budget: \$172,122 *Actual:* \$141,000 *Variance* (\$31,122)

The variance in budget and expenditures was due to factors including: 1) salary and benefit savings from planned positions left vacant during part of the year, 2) unspent hourly work budgets and instructional materials budgets, 3) carryover funds left unallocated, and 4) planned savings by an SGC.

Fund Balance

Beginning: \$551,659 *Ending:* \$610,109 *Increase:* \$58,450

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 allocate funds to continuing programs or to consider new programs.

At the end of 2012-13, unexpended funds in the BSEP School Discretionary budgets ranged from a low of \$1,481 at B-Tech to a high of \$99,438 at Berkeley High. All BSEP School Discretionary dollars allocated, but unspent, by the sites at the end of FY 2012-13, have been carried over to this year's site budgets for expenditure in FY 2013-14.

As with all BSEP resources, the General Fund paid for the increased cost of employees for the directly charged salaries, amounting to an estimate of \$62,500 for this resource.

STATUS REPORT

The School Site Discretionary funds continued a broad variety of programs during the school day and before and after school. The resource played a significant role in funding positions and contracts providing academic and social-emotional support in the schools. Additionally, discretionary funds were allotted for enrichment and experiential learning opportunities in the form of art and music classes, gardening programs, and field trips. 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;

- **Other Enriching 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)**

	Audited Actuals FY 09/10	Unaudited Actuals FY 10/11	1st Interim Budget FY 11/12	
Projected Number of Students (Adjusted CALPADS)	9,308	9,538	9,814	
REVENUE	2,295,502	2,304,201	2,326,596	
EXPENDITURES				
Certificated Salaries	570,937	693,324	741,081	
Classified Salaries	584,474	610,629	647,330	
Employee Benefits	350,124	392,690	448,872	
Books and Supplies	191,419	238,981	257,723	0
TOTAL EXPENDITURES	<u>2,019,770</u>	<u>2,300,697</u>	<u>2,968,848</u>	
NET INCREASE (DECREASE)	275,732	3,504	(642,252)	
FUND BALANCE ANALYSIS				
Beginning Fund Balance, July 1	410,237	685,969	689,473	
Net Increase(Decrease) in Fund Balance	275,732	3,504	(642,252)	
Ending Fund Balance, June 30	685,969	689,473	47,221	

MUSIC, VISUAL AND PERFORMING ARTS (BSEP Measure A, Resource 0853)

OVERVIEW

Purpose:

Providing quality instructional programs in music and the visual 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”¹

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

Release Time Teachers: Transfer to General Fund

Budget: \$404,100 *Actual: \$446,446* *Variance: \$42,346*

- Release Time Teachers: 4.56 FTE

Fourth and fifth grade students receive music instruction twice per week during two of the five contractually required preparation time periods of the classroom teachers, with **4.56** FTE funded by BSEP as a transfer to the General Fund. As enrollment in 4th/5th grade grows, so does the number of required release time FTE, increasing from 4.16 FTE in 2011-12 to 4.56 FTE in 2012-13. This year the costs associated with the raise and bonus compounded the increase, accounting for just over half of the \$42,346 variance.

Certificated Salaries

Budget: \$650,204 *Actual: \$645,735* *Variance: (\$4,469)*

- Supplemental Music Teachers: 4.64 FTE
- Middle School Music Teachers: 2.60 FTE
- Middle School Arts: 0.24 FTE
- Elementary Arts Anchor: 0.35 FTE
- Program Supervisor: 1.0 FTE

Classified Salaries

Budget: \$49,767 *Actual \$50,084* *Variance: \$317*

- Music Library Coordinator: 1.0 FTE

Classified

Budget: \$196,719 *Actual: \$181,672* *Variance: (\$15,047)*

Instructional Materials, Instruments and Equipment

Budget: \$66,112 *Actual: \$60,253* *Variance: (5,859)*

Conference/Mileage/Instructional Contracts

Budget: \$128,277 *Actual: 86,923* *Variance (41,354)*

Funds were available for each elementary school site for professional development in the arts; however not all sites participated in the program in FY 2012-13.

Indirect Costs

Budget: \$95,385 *Actual: \$ 94,297* *Variance: (\$1,088)*

Fund Balance

Beginning: \$375,400 *Ending: \$272,256* *Decrease: \$103,144*

RESOURCE SUMMARY

The cost of transfers to the General Fund was increased by the calculation of average teacher cost, based on the 2012/13 bonus and increased salaries, accounting for \$21,259 in increased charges to this resource. The General Fund took on the increased cost of employees for the directly charged salaries, estimated to be \$38,500.

Despite the partial relief from the General Fund, the fund balance for this resource has decreased by over 27% over the prior year, as compared to 13% and 16% in prior years. The primary driver of the deficit spending is associated with the increased FTE for music teachers (both transfer and directly charged) due to enrollment increases. A total of 2,164 fourth-eighth grader students participated in the Music Program, an increase of 15.6% in two years. Enrollment in grades 4-8 music classes increased by 207 students (10.6%) between 2011-12 and 2012-13; FTE increased accordingly by 0.76 FTE. Instruments and materials were provided for the additional students at a cost of \$95,000.

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 9.2 FTE.

The allocation to this resource is driven by tax receipts, and is 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 program 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 seven elementary schools and one middle school;
- Professional development for music and arts teachers;
- Staffing support for outreach programs such as Arts on The Run, Kennedy Center Partnership with Cal Performances, Cazadero Music Camp, The Music Connection, the Performing Arts Showcase, and scholarships and tutors for students in need.

Highlights of the Music and VAPA program from the past year include:

- All fourth and fifth graders participated in the program, regardless of their parent's ability to pay. 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 planned and transcribed music for a culturally relevant supplemental music book which includes a play along CD. The tunes were composed by BUSD alums.
- Music teachers designed PBIS "You Rock" and "Out of Tune" slips which they are using successfully with their grade 3-8 students.
- 225 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.
- Six middle school band and orchestras competed at the regional level at California Music Educator Association festivals.
- 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.

			(a)	(b)	(b)-(a) 2nd
	Audited	Adopted	2nd Interim	Unaudited	Interim
	Actuals	Budget	Budget	Actuals	Budget vs.
	2011/12	2012/13 as	2012/13	2012/13	Audited
	as of	of 7/1/12	as of	as of	Actuals
	6/30/12		1/31/13	6/30/12	2012/13
REVENUE					
Revenue	1,437,765	1,460,613	1,460,613	1,466,852	6,239
Transfers to General Fund (Release Time) (1)	(382,718)	(400,100)	(404,100)	(446,446)	(42,346)
NET REVENUE	1,055,047	1,060,513	1,056,513	1,020,406	(36,107)
EXPENDITURES					
Certificated Salaries	619,039	632,782	650,204	645,735	(4,469)
Classified Salaries	52,589	54,485	49,767	50,084	317
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**PUBLIC INFORMATION, TRANSLATION SERVICES, and
SUPPORT OF THE PLANNING AND OVERSIGHT COMMITTEE
(BSEP Measure A, Resource 0854)**

OVERVIEW

Purpose

Public information, translation services for District families and support of the Planning and Oversight Committee¹

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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: \$86,496

¹ BSEP Measure Section 6A

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

STATUS REPORT

The BSEP Office was restructured and the job descriptions were revised to encompass the full duties of the office, beginning with a plan that went to the board in June 20, 2012. The new BSEP Director was hired in November of 2012, and the BSEP Program Specialist in March 2013. During the transition, the previous BSEP Manager and BSEP Administrative Coordinator provided hourly and limited term support

Public Information Officer

- Produced the Board Updates, 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, which served as a key information conduit from the central administration to the school sites;
- 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.
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Translation and Interpretation

The BUSD English Learner (EL) population exceeds 15% for the Spanish language, triggering the requirement to translate key documents 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 2012-13, the BSEP Office and specialist provided Spanish translation and interpretation to support district-wide and school site-specific communications, including:

- A+ News, Biannual Report, Flyers, Posters
- IEP documents (5 documents, over 6 pages each)
- IEP meetings (5 meetings)
- Student Services (over 30 documents)
- Interpretation for Student Services for Latino families and SARBS (5-7 meetings)
- Translation and interpretation for Superintendent Search events
- Translation and interpretation for Superintendent communications
- SGC documents for schools
- Parent-Student Handbook, and other mandated district documents
- Translations for LeConte
- Educational Service Documents: EL Master Plan, Common Core, Report Cards, Story of Units, and much more
- BEARS and LEARNS uments

**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 FY2012/13**

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: Monica Thyberg

	Audited Actuals 2011/12 as of 6/30/12	Adopted Budget 2012/13 as of 7/1/12	(a) 2nd Interim Budget 2012/13 as of 1/31/13	(b) Unaudite d Actuals 2012/13 as of 6/30/12	(b)-(a) 2nd Interim Budget vs. Audited Actuals 2012/13
REVENUE	469,441	476,935	476,935	478,964	2,029
EXPENDITURES					
Classified & Certificated Salaries	247,030	264,231	262,285	261,680	(605)
Employee Benefits	91,205	106,032	86,496	84,503	(1,993)
Supplies/Equipment	11,120	10,500	10,605	2,007	(8,598)
Unallocated Reserve	0	36,137	56,496	0	(56,496)
Contracted Services	62,493	89,500	93,420	78,195	(15,225)
TOTAL EXPENDITURES	411,848	506,400	509,302	426,386	(82,916)
NET INCREASE (DECREASE)	57,593	(29,465)	(32,367)	52,579	84,946
FUND BALANCE ANALYSIS					
Beginning Fund Balance	228,035	285,628	285,628	285,628	0
Net Increase (Decrease) in Fund Balance	57,593	(29,465)	(32,367)	52,579	84,946
Ending Fund Balance	285,628	256,163	253,261	338,207	84,946

Budget Manager: Neil Smith, Interim Co-Superintendent, with
Veronica Valerio, Coordinator of Professional Development

Salaries

Budget: \$706,615

Actual: \$698,131

Variance: (\$8,484)

- Coordinator of Professional Development 0.50 FTE²
- Supervisor of Family Engagement & Equity 0.50 FTE²
- Teachers on Special Assignment (TSAs):
 - 11 Elementary Literacy Coaches 2.75 FTE
 - Elementary Literacy Lead Coach 0.40 FTE²
 - Middle School Literacy Coach 0.40 FTE
 - Elementary and Secondary Math Coaches 0.90 FTE³
 - 6 BHS Teacher Leaders 1.20 FTE
 - TSA for RtI / Behavior Specialist 0.40 FTE²
 - TSA for English Language Development 0.70 FTE

Audited
Actuals
2011/12
as of
6/30/12

Adopted

(a)

(b)

(b)-(a)

PROGRAM EVALUATION
(BSEP Measure A, Resource 0856)

OVERVIEW

Purpose

Assessing the effectiveness of the District's educational programs for improving student achievement¹

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

Certificated Salaries

Budget: \$298,784

Actual: \$305,853

Variance: \$7,069

Additional Participants in Professional Development

Assignment increased during FY 2012/13. This was achieved by moving a .7 FTE TSA from Professional Development to Evaluation by .2 FTE. Revenue was moved from Professional Development for the FTE moved from Professional Development, as well as the cost of a teacher on contract. Evaluation also paid part of the cost of a teacher on

Actual \$ 92,181

Variance: \$142

1.0 FTE

0.5 FTE

3

Employee Benefits:

Budget: \$108,635

Actual: \$ 110,022

Variance: \$1,387

Books & Supplies and Equipment

providing supplementary data analysis, assisting principals to plan or prepare data presentations to staff or School Governance Council (SGC), and supporting principals using Illuminate, Survey Monkey or PowerSchool. In FY 2012-13, four schools also received support in piloting the new Smarter Balanced Assessment in a classroom environment.

Reports: Provided reports both electronically and in paper copy that th

Mission Statement

Nine percent (9%) of the available revenues shall be dedicated to providing professional development for the District's teachers and staff, 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/Debbi D'Angelo

	Audited Actuals FY 09/10	Unaudited Actuals FY 10/11	1st Interim Budget FY 11/12
REVENUE	482,675	485,568	490,287
EXPENDITURES			
Certificated Salaries	191,297	230,361	230,737
Classified Monthly Support Salaries	80,862	89,003	87,672
Employee Benefits	68,655	89,349	96,676
Books & Supplies	0	1,540	4,200
Reserve for Personnel Variance	0	0	5,857
Carryover	0	0	29,726
Services & Other Operating Expenses	14,800	56,182	72,500
Indirect Costs	20,767	29,245	35,334
TOTAL EXPENDITURES	376,381	495,680	562,702
NET INCREASE (DECREASE)	106,294	(10,112)	(72,415)

FUND BALANCE ANALYSIS

PROGRAM (BSEP)
 source 0856)
 ures
 010/11

Notes

PARENT OUTREACH SERVICES
(BSEP Measure A, Resource 0857)

OVERVIEW

Purpose:

Support the families of Berkeley’s public school students by providing parent education and promoting greater parent involvement in their children’s education

Staff

Budget: \$136,364	Actual: \$135,757	Variance: (\$607)
x Site Coordinators	2.0 FTE	
x Site Coordinator, Bilingual	1.0 FTE	
x High School Parent Liaison:	.27 FTE ²	
x Supervisor of Family Engagement:	1.5 FTE ³	

This was the first implementation year of a pilot program for Parent Outreach based on a Board approved plan. A Supervisor of Family Engagement was hired in September, and two of three Site Coordinators were hired in early fall. A bilingual Site Coordinator was hired in February. The budget was developed on the assumption the positions would be filled for the entire year. The difference in salary and benefit expense was approximately \$40,000. Since the positions were filled after school started, the budget was revised. First and Second Interim budgets more closely reflect the actual expenses expected for the year.

Employee Benefits

Budget: \$46,527	Actual: \$45,341	Variance: (\$1,186)
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Books, Supplies and Equipment

Budget: \$10,000	Actual: \$6,695	Variance: (\$3,305)
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Books, supplies and equipment purchases were needed as part of the cost of the new program.

equip

All expenses incurred were for staff professional development. There were no expenses for contracted services. The BSEP budget for O.F.F. is \$19,438. A contract was paid for general fund and Berkeley High Funding

Indirect Costs

Budget: \$19,438

Actual: \$12,226

Variance: (\$7,212)

Fund Balance

Beginning: \$228,650

Ending: \$318,462

Increase: \$89,812

ge(t)-2(or)3(-)-1 budg4.48 0 TMT6-2(c)4c(s)-1(c) Tw [(s)2(O)-8(Fd di)-)10(e)4(t)hool2y of 4(ni)-e0.14

RESOURCE SUMMARY

The reorganization of the program during 20112 school year lead to a substantial increase in the fund balance. For 201314, this resource is budgeted for staff for the full year, which will

BERKELEY UNIFIED SCHOOL DISTRICT
 BERKELEY SCHOOLS EXCELLENCE PROGRAM (BSEP)
 PARENT OUTREACH (Measure A, Resource 0857)
 Revenue and Expenditures
 Comparison Report FY 2012/13

Purpose

One and a quarter percent (1.25%) of the revenues are dedicated to the Programs to Enhance Student Learning

	(a)	(b)	(b)-(a) 2nd		
	2nd	Unaudited	Interim	Budget	vs.
	Interim	Actuals	Budget	vs.	Audited
	Budget	2012/13	2012/13	2012/13	Actuals
	as of	as of	as of	as of	2012/13
	6/30/12	7/1/12	1/31/13	6/30/12	2012/13
REVENUE	287,529	292,123	292,123	293,366	1,243
EXPENDITURES					
Staff	83,527	173,912	136,364	135,757	(607)
Employee Benefits	30,993	86,610	46,527	45,341	(1,186)
Books & Supplies	3,472	4,000	8,880	6,225	(2,655)
Equipment	0	0	1,120	470	(650)
Unallocated Reserve	0	9,618	95,498	0	(95,498)
Services & Other Operating Expenses	24,949	28,000	15,800	3,534	(12,266)
Indirect Costs	9,578	19,307	19,438	12,226	(7,212)
TOTAL EXPENDITURES	152,519	321,447	323,627	(31,504)	89,812
Ending Fund Balance		228,650	199,326	197,146	318,462
					121,316

SCHOOL LIBRARIES
(BSEP Measure A, Resource 0860)

OVERVIEW

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.

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

Certificated Salaries

Budget:\$530,837	Actual: \$537,907	Variance:\$7,070
x 3 Middle School Teacher Librarians	3.0 FTE	
x 2 High School Teacher Librarian	2.0 FTE	
x Continuation High School Librarian	0.6 FTE	
x District Library Coordinator	1.0 FTE	

Classified Salaries

Budget:\$475,094	Actual: \$460,609	Variance:(\$14,485)
x 11 Elementary Library Media Technicians	8.80 FTE	
x 2 Middle School Library Media Technicians	1.06 FTE	
x Middle School Library Media Technician	0.8 FTE	
x Central Media Library Technician	0.8 FTE	
x High School Library Media/Textbook Technician	0.8 FTE	

Employee Benefits

Budget:\$377,362	Actual: \$369,929	Variance:(\$7,433)
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Books and Supplies

Budget:\$154,105	Actual: \$137,200	Variance:(16,905)
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Services and Other Operating Expenses

Budget:\$97,953	Actual: \$92,227	Variance:(\$5,726)
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Indirect Costs

Budget: \$108,316	Actual: \$103,288	Variance:(\$5,028)
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Fund Balance

Beginning:\$555,937	Ending: \$537,763	Decrease: \$8,174
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supports the focus on literacy, and yields strong results by mitigating the common “summer slide.”

New staff and new library system

New library staff were welcomed at BAM, BHS, Longfellow, Malcolm X and Willard. The new library management system, Destiny, provides online access from any internet connected device, and integrates resources from our online databases. In addition to the usual topic and title searches, reading levels of Fountas and Pinnell or Lexile were added as search limiters. The initial purchase and conversion was costly; subsequent years will see only an ongoing maintenance fee. Working with a new automation system, library staff support 500+ students with a welcoming, robust, and challenging library program.

Community Collaboratio

BUSD libraries 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 2012-school year we were fortunate to have visits from Annie Barrows, Cory Doctorow, Reyna Grande, Jennifer Holm, Vaunda Nelson, Raina Telgemeier, and Doug TenNoble, with a Skype visit with Adam Gidwitz to boot.

(a) (b) (b)-(a)

Audited
Actuals
2011/12
as of
6/30/12

Adopted
Budget
2012/13 as

INSTRUCTIONAL TECHNOLOGY
(BSEP Measure A, Resource 0862)
OVERVIEW

Purpose
 Providing and maintaining computers and technology in schools.¹

Budget Manager: Jay Nitschke, Director of Technology

Certificated Salaries		
Budget: \$24,565	Actual: \$24,566	Variance: \$1
x TSA for Instructional Technology	0.33 FTE ²	
Classified Salaries		
Budget: \$379,205	Actual: \$379,623	Variance: \$418
x Microcomputer Technicians	6.0 FTE ³	
x Student Systems Specialist	0.6 FTE ⁴	
x Director of Technology	0.2 FTE ⁵	
Employee Benefits		
Budget: \$184,943	Actual: \$184,296	Variance: (\$647)
Materials and Supplies		
Budget: \$ 85,628	Actual: \$ 80,701	Variance: (\$4,927)
Equipment		
Budget: 44,326	Actual: 44,041	Variance(\$285)
Services and Other Operating Expenses		
Budget: \$2,200	Actual: \$2,100	Variance: \$100
Indirect Costs		
Budget: \$45,637	Actual: \$45,709	Variance: (\$72)
Fund Balance		

¹ BSEP Measure A, Section 3C

² Multifunded: General fund 0.33, BSEP 0.34

³ Site contributions provided another 0.2 FTE for a total 6.2 FTE

⁴ The General fund provides 0.4 FTE for a total 1.0 FTE

⁵ The General fund provides 0.8 FTE for a total 1.0 FTE

Beginning:\$38,703

Ending: 38,070

Decrease: \$633

RESOURCE SUMMARY

Total expenditures for the BSEP Technology Resource were lower in FY 2012 than in FY 2011-12. While the higher expenditures for materials, supplies and equipment in FY 2011-12 created a \$60,100 decrease in the fund balance, deficit spending in 2012 was minor. The reduction was primarily the result of reduced expenditures for materials, supplies and equipment from \$196,500 in FY 2011-12 to \$124,700 in FY 2012, a reduction of \$71,700. In 2012, expenditures for salaries and benefits increased by \$40,700 primarily due to a 0.4 FTE increase in classified staff. As with all BSEP resources, the General Fund paid for the increased cost of employees for the directly charged salaries, estimated to be \$23,700 for this resource.

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 the 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

		(a)	(b)	(b)-(a) 2nd
Audited		2nd Interim	Unaudited	Interim
Actuals	Adopted	Budget	Actuals	E5W20 11.
2011/12	Budget	2012/13	2012/13	
as of	2012/13 as	as of	as of	
6/30/12	of 7/1/12	1/31/13	6/30/12	

APPENDIX to BSEP ANNUAL REPORT

BSEP Funds 5, 6, 7, 8

Budget Managers: Javetta Cleveland and Neil Smith, Interim CoSuperintendents

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

Carryover funds were available for expenditure in FY 2012 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 however, the County Tax Collection office reduced prior revenue received in each of the Funds under the "Teeter Plan" of adjustments. A financial summary for each Fund is attached and explained as follows:

BSEP Fund 5

	Fund 5 (a)	Fund 6 (a)	Fund 7 (a)	Fund 8 (b)
Revenue	(672)	(3,155)	(1,204)	(3,661)
Expenditures				
Books	0	109,149	0	0
Materials & Supplies	0	0	0	0
Equipment	0	11,532	1,951	0
Land	0	0	5,650	0
Buildings and Improvements	0	0	(1,394)	0
Total Expenditures	0	120,681	0	