Benefits and Costs of Multiple School Calendars at the Portland Public School District

A report by the District Performance Auditor
September 2009

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PORTLAND, OREGON

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Richard C. Tracy
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Memorandum

To: Board of Education

From: Richard C. Tracy, District Performance Auditor

Date: September 22, 2009

Re: Performance Audit – *Benefits and Costs of Multiple School Calendars at the Portland Public School District*

Attached is my audit report on school calendars at the Portland Public Schools. The report provides an analysis of the benefits and costs of employing multiple calendars in the District. The audit was performed in response to the 2009 Performance Audit Plan approved by the School Board.

I would like to thank the District management and staff for their assistance and cooperation in conducting this audit.

I look forward to meeting with you at upcoming Board and committee meetings to more fully discuss the report's findings and recommendations. Thank you for your ongoing support.

cc:
Carole Smith
Jollee Patterson

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SUMMARY

Establishing the annual school calendar each year has important consequences for the teachers, students, and parents in the Portland Public School district. The calendar sets the number of days of student instruction, vacations and holidays, and time for teacher planning and professional development. In addition, the times and days that students attend school has an impact on state school funding, student transportation, school meals, and administration of achievement testing and grade reports. Ensuring that the school calendar meets all the expectations of the involved participants efficiently and effectively is an on-going challenge for the district.

My audit of the District's process for establishing and administering the annual school calendar indicates that there are opportunities to improve the system to provide additional instructional time for students, reduce costs, and increase revenues. I found that the District provides schools great latitude to select the calendars and schedules depending on the specific desires of individual schools. During the 2008-2009 school year, 54 schools followed a trimester calendar, 30 schools followed a quarter calendar, and two schools followed a "year-round" calendar. In addition, PPS schools received management and teacher association approval to follow 269 departures from the standard trimester and quarter calendar approved by the Board. These departures from the standard approved calendars include late start or early dismissals on certain days, staggered beginning of the school year, and variations in when parent-teacher conferences are held.

There are a variety of benefits to providing flexibility to schools to adopt various unique school calendars and schedules. Some principals and teachers point to the importance of site based management contributing to better academics and an improved work environment. Others value the ability to develop additional time for teacher professional development and planning that can contribute to better teaching and learning. In addition, adding evening events is seen as a way to increase parent and community involvement.

However, the multiple calendars and schedules used by Portland schools also results in higher transportation costs, reduced nutrition revenues, and more administrative burden. More importantly, many of the deviations from the standard calendars reduce the amount of instruction time provided to students. Compared to

other large school districts in Oregon, PPS offers significantly more flexibility to schools to establish unique and customized academic calendars. Given the continuing financial pressures facing the district, a move to a more common calendar with minimal variation would be desirable. In addition, in view of the central importance of instructional time in improving student achievement, there is little academic justification for waivers or contract exceptions that reduce the amount of time students are in school.

I make two recommendations on page 25 to reduce or eliminate deviations to the standard school calendar, and to encourage a transition to a common single school calendar for the district.

INTRODUCTION

Establishing the annual school calendar is an important decision for the Portland School District. The annual calendar establishes school start and end dates, holidays and school closures, and the annual days of student instruction. In developing the annual calendar, district managers must consider various requirements including state laws and regulations, the provisions of employee union contracts, and the needs of internal district operations, parents, and the broader community. This report reviews the processes used by PPS to establish the annual school calendar and assesses opportunities to improve the district's approach to the annual school calendar. A more detailed description of the report's objectives, scope, and methodology is presented on page 11.

Establishing the annual school calendar at PPS

In accordance with PPS Board Policy 3.20.010.P, the School Board approves the official school year calendar generally in May after considering the recommendation of the Superintendent based on input from school staff and the Calendar Committee. Establishing the school calendar is an important decision that helps ensure compliance with annual instructional hour requirements and employee union contract provisions. Decisions about the calendar also affect overall district operations in a number of ways including transportation scheduling, nutrition planning, and employee pay periods.

For the past several years, the Portland School District has used a Calendar Committee to develop and review alternative calendars and to propose a final calendar to the District Superintendent. The members of the School Calendar Committee in 2009 included a coordinator appointed by the Superintendent, three area directors, five school administrators, three teacher and classified employee union representatives, several district support function officials, a PTA representative, and two school board members. Each member contributes suggestions on how the calendar should be established based on how the various dates would affect their interests.

The major factors considered by the District and the Calendar Committee in building the annual calendars are as follows:

- School start and end dates – The first and last day of school are essential starting points from which to build the calendar. The start of the student school year has traditionally been after the Labor Day holiday and the end of the student school year has generally been set for the second week in June. Teachers usually begin the school year several days earlier in order to plan for the year and to participate in professional development. Teachers also work several days after students leave to prepare final grades and to close classes for the summer. It has also been the practice of the district to close all schools and offices the Friday before Labor Day.

- Instructional hours and days – The district must ensure that all schools have a minimum number of instructional hours each year in accordance with Oregon State requirements (Grades K: 405 hours; Grades 1-3: 810 hours; Grades 4-8: 900 hours; and Grades 9-12: 990 hours) School district administrative directive and the teacher collective bargaining agreement also establish a minimum number of daily instructional hours and specific hours of the school day by grade level.

- Number of paid teacher days – The teacher collective bargaining agreement establishes 190 days of paid compensation for classroom teachers. For the past several years, the 190 paid teacher days has been composed of 6 paid holidays, 7 planning days, 5 professional development days, and 172 instructional days. The number of professional development days and instructional days was modified for the school year starting September 2009.

- Number and days of holidays – Official paid holidays are established by the teacher collective bargaining agreement and include Labor Day, Veterans Day, Thanksgiving day, New Years day, Martin Luther King day, and Memorial Day.

- Number and dates of professional development days – In past years, the district established up to five days for teacher professional development to be offered prior to the start of the school year and during the school year. In planning for the 2009-10 school year, the district attempted to capture four of these professional development days for additional instructional days by eliminating full days of professional development and instituting 2 hour late starts each month for training, thereby increasing instructional days from 172 to 176 days, two of which are parent/teacher conference days.

- Number and dates of teacher planning days - The teacher collective bargaining agreement requires planning days before school starts, after each grading period, and at the end of the school year. Because grading periods end on different days for quarter and trimester calendars, schools on quarter calendars will be closed for planning on different days than schools on a trimester calendar. Quarter calendar schools have four grading periods and four planning days while trimester calendar schools have three grading periods and three planning days. Trimester calendar schools also have an extra teacher planning day that does not follow a grading period for a total of four planning days in order to provide an equal number of planning days for all teachers regardless of calendar.

- Dates of parent/teacher conferences – The calendar committee also must establish days and times for parent teacher conferences in the fall of each year. Over the past several years conferences have been held in the morning, afternoon, and evening of two days and the morning of the next day, equivalent to three working days. Parent/teacher conferences have been reduced to two working days in the 2009-2010 school year. Although parent teacher conferences traditionally have been held during Thanksgiving week, moving conferences to early November or late October has frequently been discussed.

- Vacations – Winter Break (two weeks) and Spring Break (one week) are routinely set in December/January and March, respectively, and typically align with vacation periods established by other Oregon districts and the state university system.

In addition to the above factors, the Calendar Committee in the past several years reviews and recommends an annual calendar for three separate types of school calendars – a trimester calendar, a quarter (or semester) calendar, and "year-round" calendar. Each of these calendars share the same number of instructional and teacher workdays and other legal requirements but schedule different days for teacher planning days based on when grading periods end and, in the case of year-round calendars, different vacation schedules in the fall, winter, spring, and summer. Effective for the coming school year in 2009-2010, the district has eliminated the "year-round" schedule for the two schools that employed this calendar in previous years. All schools in the future will now operate with a quarter or a trimester calendar. Appendix A includes the Board approved quarter and trimester calendar for 2009-2010 school year.

Waivers and exceptions to the approved calendar and teacher contract

Under certain conditions, PPS also permits each individual school to request changes to the Board approved school calendars. Waivers and contract exceptions are most commonly requested for the following reasons:

- Changing the dates of Fall parent/teacher conferences - Many but not all schools request approval to hold evening conferences on the Monday of Thanksgiving week rather than Wednesday morning of the day before Thanksgiving. These requests are routinely approved by district management and the Portland Association of Teachers and permit teachers to have a full day off proceeding the two day Thanksgiving school closure.

- Changing to a trimester or to a quarter calendar - Over the past several years, a number of elementary and middle schools have requested to change their quarter calendar to a trimester calendar. The request requires approval of management and the Portland Association of Teachers. Currently, the great majority of elementary schools are on a trimester calendar while almost all high schools are on a quarter calendar.

- Starting school later or dismissing earlier on certain days - Some schools request a delay in the morning school starting hour or an earlier dismissal hour in the afternoon on certain days or routinely every week. Delayed starting times or early dismissal times are often intended to provide teachers with specialized professional development or team coordination opportunities, or to permit students to participate in some other activity outside of school.

- Different or staggered school year start times for various grades – Many schools request that certain grades, particularly kindergarten, sixth, and ninth grade, start the school year either before or after other grades begin school. Delayed start of kindergarten is intended to facilitate assessment and placement of students. Sixth and ninth grade only start on the first day of school is intended to help with the orientation of new students to the larger school environment.

- Alterations to the standard teacher workday – Some schools requests changes in the standard school start or end time to accommodate teacher assignments such as athletics, band, and other extracurricular activities. In addition, some schools have established unique daily bell schedules that allow teachers to report earlier or stay later than union agreement provisions.

If the calendar change does not affect teacher contract provisions, the district management may approve the change upon submittal of an electronic waiver request form describing the details of the request and providing documentation on the school "bell schedule"[1] and estimated annual instructional hours by grade level under the requested calendar change. Calendar waivers are not approved if the change results in fewer instructional hours than required by state regulation. To assist schools in completing waiver requests and providing details on instructional hours, instructions on the waiver process and a spreadsheet tool for calculating annual instructional hours is provided on the Administrative Connection PPS network site.

If the requested calendar change requires an exception to the provisions of the teacher contract, each school must receive approval from the Portland Association of Teachers. For example, if the calendar change requires moving to a trimester calendar instead of a quarter calendar, the teacher union approves this change. Union representatives at each school are responsible for coordinating with the principal to determine if a contract exception is needed. The representative polls all teachers in the building to determine if at least 75 percent agree with the contract exception. Final approval for the exception is made by the Advocacy Committee of PAT.

In certain cases, changes to the approved calendar require both district management approval and PAT contract exception approval. In these cases, school principals must receive written approval from district management and the Portland Association of Teachers.

The system for processing and recording waivers and contract exceptions has been administered in several ways over the past few years. In school year ending in 2008-09, executive administrative assistants reporting to the two Assistant Superintendents were primarily responsible for ensuring all waiver and contract exceptions were processed appropriately to ensure district instructional time policies were met, all approvals from area directors and assistant superintendents were received, and records were retained.

[1] The school "bell schedule" provides details on the start and end times of the school day for each five day week, start and end times of individual class periods, and the length of student lunch, recess, and class passing times.

Traditional and non-traditional school calendars and schedules

Public schools in the United States employ a wide variety of annual school calendars of varying length and composition. The two most commonly employed annual calendars are the semester and trimester calendars that generally last nine months from late August or early September through late May or early June with approximately 3 months of summer vacation. Some school districts around the country have opted for a "year-round" or balanced calendar to address either school crowding problems or to reduce potential knowledge loss in the long 3 month summer break. Balanced calendars reduce the amount of summer break and add shorter breaks throughout-out the school year. The total number of instructional days in the school year can remain the same for each of the three calendar options. For example, a traditional school calendar that requires 180 days of annual instruction will average 20 days of school each month for nine months in a row and no days of instruction for three months in a row in the summer. A "year round" or balanced calendar could include four separate 45 day school terms adding to 180 days of instruction that are evenly spread over the year with two or more weeks of vacation between each term. The table below summarizes the monthly school days for a traditional calendar and two separate year-round or balanced calendars. (See also Appendix C).

Traditional calendar days compared to balanced (year-round) days: Approximate

	CALENDAR TYPE		
	Traditional	Quarter Balanced	Trimester Balanced
Sept	20	20	20
Oct	20	20	20
Nov	20	5	20
Dec	20	20	0
Jan	20	20	20
Feb	20	5	20
Mar	20	20	20
Apr	20	20	0
May	20	5	20
Jun	0	20	20
Jul	0	20	20
Aug	0	5	0
TOTAL	**180**	**180**	**180**

SOURCE: The Center for Public Education – *What Research Says About Reorganizing School Schedules* – September 2006

In addition to semester, trimester, and balanced calendars, school districts also utilize a variety of daily schedules and class periods. Schools commonly employ four, five, six, or seven class period days. Many schools employ a "block schedule" composed of class periods of 90 minutes or longer, while other schools use a combination of longer block periods and shorter standard length period of 50 to 60 minutes. Regardless of the number of class periods chosen for a particular school, sufficient instructional time must be achieved to address required state requirements and to provide sufficient learning time to earn high school credits needed for graduation.

The following three schedules illustrate typical weekly schedules used in public school districts. The schedules illustrated are a standard seven period semester schedule, a five period trimester schedule, and common AB block schedule.

Seven period semester schedule (Source: Auditor analysis of professional literature)

<table>
<tr><th>MON</th><th>TUES</th><th>WEDS
Block day</th><th>THURS
Block day</th><th>FRI</th></tr>
<tr><td>1</td><td>1</td><td rowspan="2">1</td><td rowspan="2">4</td><td>1</td></tr>
<tr><td>2</td><td>2</td><td>2</td></tr>
<tr><td>3</td><td>3</td><td></td><td>5</td><td>3</td></tr>
<tr><td>4</td><td>4</td><td>Lunch</td><td>Lunch</td><td>4</td></tr>
<tr><td>Lunch</td><td>Lunch</td><td rowspan="2">2</td><td rowspan="2">6</td><td>Lunch</td></tr>
<tr><td>5</td><td>5</td><td>5</td></tr>
<tr><td>6</td><td>6</td><td rowspan="2">3</td><td rowspan="2">7</td><td>6</td></tr>
<tr><td>7</td><td>7</td><td>7</td></tr>
</table>

- Two 18 week semesters
- Four grading periods
- 7 hour day
- Mon, Tues, Fri classes @ 52 minutes long
- Wed, Thursday block classes @ 90 minutes
- One teacher preparation period each day
- Student typically takes 6 to 7 classes each semester and earns a total of 12 to 14 units (6 to 7 credits per year)

Five period trimester schedule

(Source: Auditor analysis of professional literature)

MON	TUES	WEDS	THURS	FRI
1	1	1	1	1
2	2	2	2	2
3	3	3	3	3
Lunch				
4	4	4	4	4
5	5	5	5	5

- Three 12 week trimesters
- Three grading periods
- 7 hour day
- MTWTF classes @ 72 minutes long
- Teachers have one planning period daily
- Students normally takes five classes each trimester and earns 15 units annually (7.5 credits per year)
- Year long classes meet two trimesters

Basic AB block schedule

(Source: Auditor analysis of professional literature)

Semester One and Two

MON A	TUES B	WEDS A	THURS B	FRI A
Course 1	Course 5	Course 1	Course 5	Course 1
Course 2	Course 6	Course 2	Course 6	Course 2
Lunch				
Course 3	Course 7	Course 3	Course 7	Course 3
Course 4	Course 8	Course 4	Course 8	Course 4

- Two 18 week semesters
- "A" course days alternate with "B" course days each day over the entire year
- Four grading periods (two progress and two final)
- 7 hour day
- MTWTF classes are @90 minutes long
- Teachers teach 3 classes daily with one teacher prep period each day
- Students take 8 classes each year and earn 16 units annually (8 credits per year)
- Some blocks can be split into two 45 minute periods for electives

Audit objectives, scope, and methods

This audit had four primary objectives as follows:

- To review and evaluate PPS policies and procedures for establishing the annual school calendar
- To review and evaluate the processes for requesting and approving exceptions and waivers to the approved calendar
- To compare PPS's annual calendar to other large Oregon districts
- To assess the benefits and costs of the multiple calendar system

To address these objectives, I interviewed PPS managers and administrators, reviewed PPS policies, procedures, and records, and visited schools with different calendars and schedules. I met with representatives of the Portland Association of Teachers to determine their interests and concerns about the annual calendar process. I also met with members of the PPS school calendar committee to identify various factors that are considered in establishing the annual district calendar. I obtained estimates of various costs associated with implementing the school calendar for the 2008-09 school year. I also conducted a telephone survey of seven large Oregon school districts to determine their methods for establishing the annual district calendar. I also conducted literature research to identify current studies of school calendar and scheduling approaches and national experience with traditional and non-traditional calendars and schedules. I limited my analysis to a review of current calendars employed at PPS and did not evaluate the benefits and costs of non-traditional calendars such as year-round or "balanced calendar" approaches nor did I attempt to determine the "optimal" annual calendar or schedule for PPS.

This audit was conducted in accordance with my 2009 Audit Plan approved by the PPS School Board. It was performed during the months on April, May, and June of 2009. The audit was conducted in accordance with generally accepted government auditing standards. Those standards require that I plan and perform the audit to obtain sufficient, appropriate evidence to provide a reasonable basis for my findings and conclusions based on my audit objectives. I believe the evidence obtained provides a reasonable basis for the finding and conclusions based on the audit objectives.

AUDIT RESULTS

The PPS district provides schools significant flexibility to adopt various approved school calendars depending on the specific desires of individual schools. Over the past several years PPS schools have used one of three approved calendars: a quarter, a trimester, or a year-round calendar. (The year-round calendar options was not approved for use in the coming 2009-2010 school year.) In addition, schools have requested and received a number of waivers and contract exceptions to these standard calendars to implement unique school-specific variations such as later start times or staggered start of the school year. While there are some specific benefits to providing flexibility to individual schools to customize their calendar, the variations in calendars throughout the district can be an administrative burden often resulting in higher costs, reduced revenue, and uncertain academic benefit. Compared to other large school districts in Oregon, PPS offers significantly more flexibility to individual schools to establish unique and customized academic calendars. In view of the continuing financial pressures facing the district, a move to a more common calendar with minimal variations would help reduce costs, increase revenue, reduce administrative overhead, and increase instruction time. Although it may be relatively easy to reduce or eliminate calendar waivers and contract exceptions, the adoption of a specific common annual calendar will require significant planning to ensure that district goals are optimally addressed.

The multiple calendar system at PPS: BENEFITS AND COSTS

During the 2008-2009 school year, 54 PPS schools followed a Trimester calendar, 30 schools followed a Quarter calendar, and 2 schools followed different Year-round calendars. In addition, PPS schools received management approval for approximately 111 waivers of various types to permit unique differences from the Board approved calendars. The most common waivers to the approved annual calendar allowed parent conferences to be held on different days or evenings, permitted late start or early dismissal times at various schools, or established staggered start of school for kindergarten, sixth, and ninth grade students. Schools also requested 158 exceptions to the union agreement with the teachers association such as holding

current/teacher conferences or special evening events on additional evenings in the Fall and Spring.

Based on my discussions with PPS officials, union representatives, and parents, and my review of waiver and contract documents, I have identified both benefits and costs to the adoption of more than one approved calendar and the ability to create unique, school-specific calendars. The two sections that follow briefly describe the major benefits and costs associated with the multiple calendar system employed at PPS. A final section weighs the benefits of the current approach to calendar against the costs.

BENEFITS of employing multiple calendars

+ More site-based management: School principals and staff value the ability to select and design the school calendar with their particular school in mind. Many believe that student and staff needs are better met if they have flexibility to depart from the established calendar standard. Site-based management is seen as positive contributor to better management, improved academics, and an improved work environment.

+ Better student orientation and assessment: Many principals believe that kindergartners, sixth graders, and ninth graders benefit from individual assessment or special orientation sessions without other students present prior joining a new and larger school environment. It is believed that assessment can help identify academic needs of kindergartners before full school begins and an orientation for six and ninth graders alone helps them adjust and transition successfully to a larger and more complex middle and high school conditions.

+ More teacher planning and development time: School principals often request delayed start on certain days or early release on other days to foster improved teacher planning and to provide professional development training. Additional time for joint teacher planning is viewed as an important way to improve team teaching, and to improve the assessment of student needs. Similarly, opportunities for specialized, site-based professional development helps address teacher development needs and may contribute to improved teaching and learning.

+ Increased parent and community involvement: Adding evening events to the school calendar for parent/teacher conferences or for conferences in the Spring helps increase parent attendance and expands the opportunities for parents to be

involved in their child's school life. Principals believe that parental involvement is key to better student achievement and increasing opportunities for parent/teacher communication supports student learning. In addition, some special events at schools can strengthen relationships with the surrounding community.

+ Longer trimester terms help struggling and new students: Many elementary principals believe that the longer grading period available in a trimester calendar helps new and struggling students improve performance before a grade is given. Elementary principals have justified the move from a quarter calendar to a trimester calendar on the basis of the longer grading term and the expanded opportunity to improve student performance prior to grading. In addition, reducing the number of times that teachers must grade students from four times a year to three times a year is viewed as a positive outcome in reducing teacher workload.

COSTS of employing multiple calendars

- Instructional time loss: Waivers associated with late start, early dismissal, and staggered school year start result in loss of instructional time for students. Similarly, holding extra teacher/parent conferences in Spring or holding evening events reduce student instructional time. Waiver requests frequently fail to fully document the impact of the waiver on instructional time requiring central office administrative staff to spend time to check and calculate whether instructional time minimums are met. Even when instructional time minimums are still met, many waivers reduce total hours of instruction for students. A frequent reason for denying some waivers is the loss of student instructional time.

- More transportation costs: The two calendar option and the unique calendars approved through waivers result in additional transportation costs. The additional bus and other transportation costs due to calendar waivers for the 2008-2009 school year were estimated by PPS Transportation officials to amount to $23,600. In addition, if all High Schools in the district followed a standard "bell time" (start and end of day) an additional $360,000 in transportation savings could have been realized through the reduction of six bus routes. While estimates of transportation costs associated with waivers have not been finalized for the coming school year, operating two calendars (quarter and trimester) costs $154,000 more than if a common calendar was employed.

- Less nutrition revenue: PPS generates federal reimbursement and paid revenues when schools provide breakfasts and lunches to students. Waivers to the established calendar for late start, early release, and staggered start for certain grades result in fewer meals served and lower revenues to support the nutrition program. In the 2008-09 school year, PPS Nutrition program officials estimate that the district lost approximately $180,000 in revenue as a result of calendar waivers. Over $150,000 of this amount was lost as a result of weekly late starts or weekly early releases at six high schools.

- Reduced staffing flexibility: PPS schools are often funded for a partial teaching position and must share teaching staff especially for subjects like music, physical education, art, and special education. However, when the schools do not use the same annual calendar or schools have different start or ending times, it is much more difficult to schedule staff to teach at two schools. According to HR representatives, the inability to share staff between schools on different calendars can result in higher costs and can result in reduced program offerings. Shared staff must also put in extra time if preparing grades for two different calendars that have different grading periods.

- Higher administrative overhead: Multiple calendars and the waiver process create extra work for several administrative functions at PPS. For example, accurate tracking of daily student attendance, an important factor in determining average daily membership, is more difficult when individual schools have different dates when school is in session. Similarly, extra work is needed to gather and record information on student progress and grades when grading periods start and end on different dates. While school attendance grading data will be easier to collect in the 2009-10 school year with the elimination of two year-round calendars, the trimester and quarter calendars and the special calendar for the Pioneer schools continues to add to the time needed to set computer codes, communicate with schools, and issue reminders about grading deadlines.

  In addition, significant administrative time is required to manage the processes for receiving, reviewing, and approving/denying waiver and contract exceptions. Two executive secretaries for elementary and high schools plus administrative staff at the central office and at schools processed over 260 waivers and teacher contract exceptions last school year. Each waiver and/or exception needed review and written approval by

PPS managers and/or teacher association representatives to ensure instructional hour minimums were met, transportation and nutrition costs were considered, and unique school calendar provisions are recorded and communicated to various support functions including IT, bus schedulers, food preparation staff, payroll, and human resources. Also, at least 75 percent of teaching staff at each school need to vote on contract exceptions prior to approval by union officials. Paper work associated with this effort fill three large binders. Administrative staff told me that significant time and effort is needed to manage this process because of the amount of paperwork involved, the errors in the request forms and submitted documentation, and the frequently missed deadlines for waiver submittals that require additional updates into the summer before start of school.

- Additional demands on parents: My discussion with several parent representatives indicates that PPS calendars are viewed as confusing and frustrating. They questioned why there are so many options available to individual schools. Different and specialized calendars cause day-care and work-schedule problems for parents that have children in schools with different schedules. Scheduling teacher planning and professional development on the same days was very helpful last year but the coming year eliminates professional development days so parent will again have to arrange for day care on different days depending on whether their children are on a quarter or trimester calendar. While some parents understand the value of site-based decisions and flexibility, more uniformity in school calendars and schedules is desirable. According to parents I talked to, a move to a more common, unified calendar would mean less individual school choice but a more streamlined, understandable, and simplified school year calendar.

Costs outweigh the benefits of a multiple calendar system

Based on my review of the benefits and costs of employing a multiple calendar system, I believe that the costs of the approach used at PPS outweigh its benefits for three primary reasons.

First, while waivers to the approved district calendar have positive intentions, many of them result in a direct reduction in instructional time provided to students. Late and staggered school start times, early release days, additional evening events in exchange for a reduced school day may all contribute to enhanced teacher planning and development, easier student transitions, or better teacher/parent interactions. However, they also reduce the number of hours of student instruction. Research has shown that the single most important factor in improving student achievement is to increase the amount of well-used instructional time.[2] When hard choices must be made between several beneficial actions, priority should be given to the choice that has the most value in helping achieve the principal goal of the district – improving student achievement.

Second, during an environment of declining school resources and increasing fixed costs, every reasonable effort should be made to reduce costs and enhance available revenues. Actions that increase administrative overhead, increase transportation costs, and reduce nutrition revenues should be avoided. While reducing transportation costs will not result in a dollar for dollar increase in general resources available for instruction, it will have a positive impact on the overall availability of state school fund support and reduce the district's share of transportation expenditures. Similarly, increasing nutrition revenues will also not increase resources available for classroom instruction but it will provide for stable food service delivery, more nutritional meals for students, and reduced potential of emergency support from general resources. Finally, reducing paperwork and bureaucratic effort, streamlining and simplifying system administration, and creating more opportunities for sharing can help the organization free time and resources for more valuable activity.

Third, it is difficult to determine if the choice of a particular academic calendar or the departure from features of the approved calendars is driven by a strong and demonstrable assessment of academic value. In some cases, it appears that decisions are based as much on the needs of employees as it is on meeting student academic needs. For example, the strong preference for the trimester calendar at the elementary and middle school level may be a function of the benefit of having fewer grading periods for teachers

[2] *Opportunities to Increase the Amount and Quality of Instructional Time* - District Performance Auditor, Portland Public Schools, September 2007

as well as lengthening the assessment period before grading. If the trimester calendar truly has some advantage in improving student performance by offering a longer period of assessment, it should have that same positive impact at the high school level. In a similar vein, high schools appear to favor the quarter system not because it has been demonstrated to provide improved academic results over other calendar options but largely because the quarter/semester system is traditional and changes would require significant thought and effort. Without more data-driven demonstration that the multiple calendar approach is superior in meeting the academic goals of the district, it is hard to justify the variations in view of the costs and impact on student instruction.

Other actions to control waivers and contract exceptions

There may be opportunities to achieve some of the goals of waivers and contract exceptions without initiating waivers or obtaining exceptions. For example, 54 of the contract exceptions relate to seeking teacher association approval to change from a quarter calendar to a trimester calendar. However, the language of the agreement between the district and the association states that – "With respect to the calendar ultimately adopted, the Board retains the right and authority to change the days on which school shall be held and make other adjustments to the school calendar." Since the Board approves two separate calendars for district schools – a quarter and a trimester – it is not clear why the choice of one of those calendars requires union approval through a contract exception. After discussion with HR legal counsel, however, I learned that the teachers association interprets the contract language to mean a *single* calendar; therefore, moving from one approved calendar to another approved calendar requires a contract exception. This provision of the teacher agreement may warrant adjustment to reflect current practice in the district and reduce administrative effort and costs associated with the contract exception process.

In addition, a number of waivers for late start of a school day or early dismissal of school are intended to provide additional time for schools to hold an hour or two of teacher professional development or planning on certain days of the month. However, the teacher association contract also provides that teachers can be required to attend up to two hours of training or meetings beyond the normal workday on Monday or Tuesday of each week. Based on my discussions with management, this provision may not be fully utilized in all district schools. Specifically, some schools make use of the two hours each week and some schools do not. Consequently, there may be opportunities to address professional development and school planning needs without waivers to the established school day and the loss of instructional time.

Calendars employed in other Oregon school districts

My survey of seven other large districts in Oregon shows that the majority of districts employ more than one calendar, typically a trimester calendar for elementary grades and a semester (quarter) calendar for high schools and some middle schools. However, only one of the seven districts I contacted permit revisions to the standard calendars to the extent allowed at PPS. Some districts permit flexibility in setting parent-teacher conferences and others allow staggered start of the school year for certain grades but none of the districts allow the wide range of different calendars that is common at PPS.

As shown in the table below, four of the seven districts employ both a semester (quarter) and trimester school calendar. Although some districts have studied or experimented with “year-round” balanced calendars, none of the districts at the present time have established or approved a balanced calendar for schools in their district. Although trimester calendars are most commonly used in grades K-6 , a number of middle school in various districts use a trimester calendar and several high schools use a trimester calendar including Hillsboro High in the Hillsboro District, Southridge in the Beaverton District, and La Pine High School in the Bend-La Pine district.

Only one other of the seven districts I contacted has implemented a process to allow waivers and contract exceptions to the standard calendars approved by their school boards. The Eugene district allows variations to the Board approved calendar if schools work with site councils, staff, and the union to reach agreements. Several other district officials indicated that they offer some flexibility for schools to establish different hours for parent teacher conferences or for start and dismissal of kindergarten. In addition, an official from the Salem – Keizer district told me that some schools have start and dismissal times that are different from other schools but they are actively restricting variations to develop a more consistent and uniform calendar for all schools. Several representatives told me that their districts strive for uniformity to control transportation costs and to improve communication with parents and families.

Survey of Oregon school districts: School calendar processes, 2009-10

DISTRICT	# of approved calendars	Grade	Common calendar	Waiver & contract exceptions?	Unique scheduling features
Beaverton	2	**K - 6** **7 - 12** **H.S.** (2)	trimester semester trimester	no	
Bend-La Pine	2	Bend: **K - 8** **H.S.** La Pine: **K - 12**	 trimester semester trimester	no	
Eugene	2	**K - 12** **M.S.** (3)	semester trimester	yes	
Hillsboro	2	**K - 6** **7 - 12**	trimester semester	no	
Medford	1	**K - 12**	semester	no	
North Clackamas	1	**K - 8** **H.S.**	trimester semester	no	
Salem-Keizer	1	**K - 12** **M.S.** (2)	semester trimester	some	4x4 AB block schedules
PORTLAND	2	**K - 8** (55) **K - 8** (5) **M.S.** (7) **M.S.** (2) **H.S.** (17) **K - 12** (1)	trimester semester semester trimester semester trimester	yes	various types of hybrid block schedules at M.S. and H.S.

SOURCE: Auditor telephone survey and web-site calendars.

Factors to consider in moving to a common calendar

Although there may be a number of advantages to moving to a single common calendar for all schools in the PPS district, significant thought and study should proceed any decision. In my view, the choice of a common calendar, should attempt to address the primary goals of the district related to improving student achievement while balancing the practical considerations of costs, community desires, and teacher contract provisions.

Based on my review of academic literature and other research on school calendar options, some of the pros and cons of each calendar option are described below.

TRIMESTER CALENDAR

Pros:

- Students may take more courses in a year than in a quarter calendar thereby provides an opportunity to increase graduation requirements
- Fewer classes each term for students and teachers, less preparation time for students and teachers each term
- More opportunity to take a variety of classes and to create new classes
- More opportunity for credit recovery if students fail a class
- Fewer classes each term mean longer class periods and more in-depth instruction

Cons:

- Teachers may have more total preparations each academic year
- Planning and training required to change semester lesson plans to more compressed trimester calendar and longer class periods
- More demands on guidance counselors to switch from one schedule change to two schedule changes each year
- Resistance to change from traditional approaches

SEMESTER (QUARTER) CALENDAR

Pros:

- Traditional calendar format of the district is understood by teachers, administrators, and parents
- Current curriculum and lessons plans at most middle and high schools based on quarter calendar
- Provides at least four grading periods throughout the year

Cons:

- Limits ability to increase number of credits that can be earned each year at high schools
- Second quarter interrupted with long holidays and vacations
- Potential calendar mismatch with elementary and middle feeder schools on trimesters
- Shorter time between grading periods allows less opportunity for student improvement

BALANCED (YEAR-ROUND) CALENDAR

Pros:

- Shorter summer break may reduce student knowledge loss
- More frequent breaks throughout the year helps reduce teacher stress and burnout
- Opportunity to provide enhancements or remedial education during the intersession breaks
- Potential for improved attendance because vacation opportunities occur throughout the year
- Multi-tracked balanced calendars can improve use of school facilities in crowded districts

Cons:

- Community and parent resistance to shorter summer vacation
- Potential disruption to traditional athletic program and AP schedules
- Students and teachers may lose summer employment opportunities
- Research is inconclusive on impact on student achievement

RECOMMENDATIONS

In order to establish an annual school calendar that lowers costs, increases revenues, and reduces the loss of student instructional time, the Portland Public School district should take the following actions:

1. **Discontinue the calendar waiver and contract exception process.**
   Over the next year, the District should phase-out the approval of school calendar waivers and contract exceptions that reduce instructional time, increase transportation and administrative costs, and reduce nutrition revenues. While there may special circumstances where waivers and exceptions to the district standard may be appropriate, they should be infrequent and cost neutral. Waivers that reduce any amount of student instructional time should not be approved. In addition, in lieu of waivers and contract exceptions, the district should encourage all schools to take full advantage of the teacher contract provision that permits up to two hours weekly of training or meeting time beyond the normal school day.

2. **Strongly consider adopting a single common calendar for all school grade levels.**
   Shifting all schools to a quarter, trimester, or balanced calendar would simplify administrative effort, lower costs, and improve coordination of teacher planning and training. In addition, a common calendar would improve communications and reduce the impact on families with children on different school calendars. The selection of a single calendar, however, will require significant thought and planning to determine which calendar provides the most benefit to the district in meeting goals related to closing the achievement gap and increasing graduation requirements. The district should conduct an in-depth study of the optimal calendar for PPS over the next year to inform any decision about selection of a common calendar.

MANAGEMENT RESPONSE

PORTLAND PUBLIC SCHOOLS
501 North Dixon Street / Portland, OR 97227
Telephone: (503) 916-3200 / Fax: (503) 916-3110
Mailing Address: P. O. Box 3107/97208-3107
Email: csmith1@pps.k12.or.us
OFFICE OF THE SUPERINTENDENT

Carole Smith
Superintendent

September 8, 2009

Dick Tracy, Performance Auditor
Portland Board of Education
501 N. Dixon St.
Portland, Oregon 97227

RE: School Calendar Audit

Dear Mr. Tracy,

Thank you for your assessment of the challenges inherent in Portland Public Schools' varied school calendars, the costs of allowing such diversity, and the pros and cons of each calendar option.

As we consider our PPS calendars, three main factors come into play. The first, and most important, is educational: What calendar allows us to provide the greatest instructional time and most benefit to student achievement? Families and community interests are another factor: What calendar makes it most likely that parents will participate in their children's education, and how can we ensure that our school calendar meshes with the rest of a family's life, be they work obligations or extracurricular and community opportunities? The final concern is operations: How can we operate as efficiently as possible and cut unnecessary administrative overhead?

Your audit helps us explore all of these factors and costs, and the trade-offs among the different options.

You have proposed two broad recommendations:

1) **Discontinue the calendar waiver and contract exception process.**

Right now, our school district and individual schools must operate under severe constraints: the instructional time requirements of state law, the directives of district leadership and the restrictions bargained into our teachers' contract over several decades. We believe that the waiver and contract exception process now give limited – but critical – flexibility in some cases for schools to pursue initiatives to improve student achievement. We are not ready to discontinue those processes completely.

However, we do intend to reduce the number of waivers and exceptions, and to pursue reforms that could eliminate the need for the vast majority.

We have been exercising greater review of the management waivers to protect instructional time. You note that in 2008-09, two executive administrative assistants were responsible for the waiver and contract exception process; however, the area directors and assistant superintendents were directly responsible for final approval of any and all waivers.

For the 2009-10 school-year, 180 waivers were granted:

- 75 to allow an additional evening of parent-teacher conferences in the fall, substituting for a morning of parent-teacher conferences. The vast majority of our schools choose this option, which adds parent convenience with no increase in teacher work time and no loss to students' instructional time. We could save schools and the district the time and energy of going through the process if PPS and the Portland Association of Teachers were to negotiate a contract that included teachers working two evening conferences during the school year (one is now included), trading off the half-day of morning conferences. This has not been on the table in the current PAT negotiations, but could be a topic in the next contract discussions.
- 53 waivers to allow a late start for kindergarten classes. Again, all but a handful of our K-5 and K-8 schools have kindergarteners start a few days late, to allow for assessments of incoming students. We might save administrative expense and eliminate the need for waivers by adopting one standard elementary calendar that incorporates a later kindergarten start date, in keeping with your second recommendation.
- 17 waivers at the high school level to allow for a modified block schedule with Wednesday late openings (10 waivers among 14 high schools) and to allow late opening for upper grades on the first day of school for freshman orientation (7 schools). Again, those waivers have become the norm at most high schools, so we might be able to incorporate them into a standard high school calendar and reduce the administrative burden.
- 35 remaining waivers for miscellaneous reasons. Schools are looking for unique strategies to maximize instructional time, build in professional development time, and support school based initiatives. We weighed each of these waivers to minimize instructional time loss and to support initiatives to increase student achievement.

The 182 contract exceptions for 2009-10 follow similar patterns, with roughly a third related to elementary and middle schools wishing to follow a trimester calendar, more than a third related to fall conferences and 57 miscellaneous exceptions.

In short, while we do not believe we should discontinue the waiver and contract exception process, we will pursue ways to significantly reduce their use by:

- Moving toward a consistent calendar for schools at the same grade levels (see below),
- More effective use of time already allowed in the contract (including the weekly two-hour meeting/professional development time), and
- Negotiating more calendar and scheduling flexibility in the teacher contract, whether in the current negotiations or in the next round of bargaining.

Contract provisions play a large role in developing the PPS calendars, and teachers and union leaders are part of the annual calendar committee developing recommendations for

the superintendent and school board. We hope that PPS and the Portland Association of Teachers will soon reach a contract, so that we have more certainty as we approach development of a 2010-11 school year calendar.

2) **Strongly consider adopting a single common calendar for all school grade levels.**

First, we do agree that Portland Public Schools students would be better served by bringing more consistency in our school calendars. You have clearly identified the cost of our multiple calendars: higher transportation costs, lower nutrition revenue, reduced staffing flexibility and a greater administrative burden (although we do not believe the calendars have any effect on the daily student membership upon which state funding is calculated).

We note that the PPS calendar for the upcoming year makes some strides toward your goals.

- We have eliminated the "year-round" calendar in place at Abernethy and Peninsula schools – believing that the benefits of a school year extended three weeks into the summer, with more frequent and longer vacations did not outweigh the costs. Now only the Pioneer schools serving students with special needs follow a unique, true year-round schedule.
- All high schools except Benson and Lincoln have a weekly late opening, with seven period-days and a modified block schedule, and all but three (ACT, POWER and BizTech) will follow the same two-hour delayed opening on the third Wednesday as other PPS schools.
- Freshman orientation is limited to a maximum of two hours at high schools, preserving instructional time for upper grades.
- Kindergarteners start on September 11 at all district schools – a consistency that has been phased in over the last several years.

However, even with those changes, we still have roughly half of our students and teachers now on a trimester calendar, and half following a quarter calendar – a fundamental split.

In keeping with your recommendation, I am directing Sara Allan, Executive Director of System Planning and Performance to conduct a thorough review of the calendar, including three options:

- Moving all PPS schools, at all grade levels, to one calendar, as you suggest. That review will weigh the benefits of uniformity, including possible student achievement impacts, operational costs and family benefits, against the potential disruption as half of our staff and students switch from one calendar to another.

- Moving all elementary (PK-5 and K-8) schools to a common trimester calendar and all middle and high schools to a quarter calendar. All but five K-5, K-8 and K-12 schools now follow a trimester calendar (despite the need for a 75 percent staff approval annually for the contract exception), and all but two middle and high schools follow a quarter calendar. This is a halfway measure that would cause less disruption, might allow us to reduce contract exceptions and waivers, and might bring many of the benefits of full uniformity.

- Developing a true year-round schedule for all of our students, one that is truly balanced across the calendar with a far shorter summer break and strategic use of the inter-sessions for academic interventions and enrichment.

We will conduct strong cost-benefit analyses of all these options, considering all the factors: educational, financial and family impact.

At the same time, once contract negotiations with PAT are resolved, we need to continue to consider the most effective ways to increase instructional time and professional development within our daily school schedules and overall district calendars.

We appreciate the research and recommendations in this audit, and believe that they will spur Portland Public Schools toward further improvements in managing our school year to make the most of our limited resources and to focus our school time on increasing student achievement.

Sincerely,

Carole Smith, Superintendent
Portland Public Schools

APPENDICES

APPENDIX A

Portland Public Schools

2009-2010
SCHOOL QUARTER CALENDAR

The Quarter Calendar is one of three district calendars that a school community may choose to use (Quarter, Trimester, Year-Round). To determine which calendar your school follows, check with your school's office. All calendars may be found on the district website: http://www.pps.k12.or.us/news/events.php

JUNE — 2009

S	M	T	W	Th	F	S
	1	2	3	4	5	6
7	8	9	10 END GRD	11 PLAN	12 PLAN	13
14	15	16	17	18	19	20
21	22	23	24	25	26	27
28	29	30				

JULY — 2009

S	M	T	W	Th	F	S
			1	2	H	4
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12	13	14	15	16	17	18
19	20	21	22	23	24	25
26	27	28	29	30	31	

AUGUST — 2009

S	M	T	W	Th	F	S
						1
2	3	4	5	6	7	8
9	10	11	12	13	14	15
16	17 CC	18	19	20	21	22
23	24	25	26	27	28	29
30	31					

SEPTEMBER — 2009

S	M	T	W	Th	F	S
		1 PROF* PLAN	2 PROF* PLAN	3 PLAN	X	5
6	H	8 START	9	10	11	12
13	14	15	16 LO	17	18	19
20	21	22	23	24	25	26
27	28	29	30			

OCTOBER — 2009

S	M	T	W	Th	F	S
				1	2	3
4	5	6 MT	7	8	9 INS	10
11	12	13	14	15	16	17
18	19	20	21 LO	22	23	24
25	26	27	28	29	30	31

NOVEMBER — 2009

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1	2	3	4	5 GRD	6 PLAN CC	7
8	9	10	H	12	13	14
15	16	17	18	19	20	21
22	23 EVE°	24 AM/PM/ EVE	25 AM	H	X	28
29	30					

DECEMBER — 2009

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		1	2	3	4	5
6	7	8 MT	9	10	11	12
13	14	15	16 LO	17	18	19
20	21	22	23	24	X	26
27	28	29	30	31		

❄ Snow **Make-Up Days** will be added to the end of the school year.

JANUARY — 2010

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17	HC	19	20 LO	21	22	23
24	25	26	27	28	29 GRD	30
31						

FEBRUARY — 2010

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21	22	23	24	25	26 TRF-H	27
28						

MARCH — 2010

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7	8	9	10	11	12 TRF-E/MS	13
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21	22	23	24	25	26	27
28	29	30	31			

APRIL — 2010

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25	26	27	28	29	30	

MAY — 2010

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JUNE — 2010

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JULY — 2010

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18	19	20	21	22	23	24
25	26	27	28	29	30	31

SYMBOL EXPLANATION

	Students Out of School
AM	Morning Conferences, No PM School for Teachers (no school for students)
AM/PM/EVE	Morning/Afternoon/Evening Conferences (no school for students)
CC	Classified Connection (Prof. Dev. for classified employees)
END	End of School Year
EVE°	Optional Evening Conferences (school decision)
GRD	Grading Period Ends
H	Holiday (schools and all offices closed)
HC	Holiday Commemoration (schools and all offices closed)
INS	Statewide Inservice (no school - all 190, 200, 210, 225 & 230 employees off)
LO	Late Opening - Professional Development Time (schools start 2 hours late)
MT	Mid-Term Progress Reports Entered into eSIS
PLAN	Teacher Planning Day
PROF	Professional Development Day
START	Start of School Year
TRF-H	High School Transfer Application Deadline
TRF-E/MS	Elementary/Middle School Transfer Application Deadline
X	Schools and Offices Closed
*	Prof. Dev. Day or Teacher Plan Day (school decision)
—	Snow make-up days - this would move END, GRD, and PLAN days over accordingly

(rev.) June 2, 2009

Portland Public Schools

2009-2010
SCHOOL TRIMESTER CALENDAR

The Trimester Calendar is one of three district calendars that a school community may choose to use (Trimester, Quarter, Year-Round). To determine which calendar your school follows, check with your school's office. All calendars may be found on the district website: http://www.pps.k12.or.us/news/events.php

JUNE — 2009

S	M	T	W	Th	F	S
	1	2	3	4	5	6
7	8	9	10 END GRD	11 PLAN	12 PLAN	13
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JULY — 2009

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AUGUST — 2009

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SEPTEMBER — 2009

S	M	T	W	Th	F	S
		1 PROF* PLAN	2 PROF* PLAN	3 PLAN	X	5
6	H	8 START	9	10	11	12
13	14	15	16 LO	17	18	19
20	21	22	23	24	25	26
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OCTOBER — 2009

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NOVEMBER — 2009

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22	23 EVE°	24 AM/PM/EVE	25 AM	H	X	28
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DECEMBER — 2009

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		1	2	3 GRD	4 PLAN	5
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13	14	15	16 LO	17	18	19
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JANUARY — 2010

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FEBRUARY — 2010

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14	H	16	17 LO	18	19	20
21	22	23	24	25	26 TRF-H	27
28						

MARCH — 2010

S	M	T	W	Th	F	S
	1	2	3	4	5	6
7	8	9	10	11	12 GRD TRF-E/MS	13
14	15 PLAN CC	16	17 LO	18	19	20
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APRIL — 2010

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MAY — 2010

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JUNE — 2010

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JULY — 2010

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(rev.) June 2, 2009

APPENDIX B

Portland Public Schools

2009-10 schools following QUARTER Calendar:

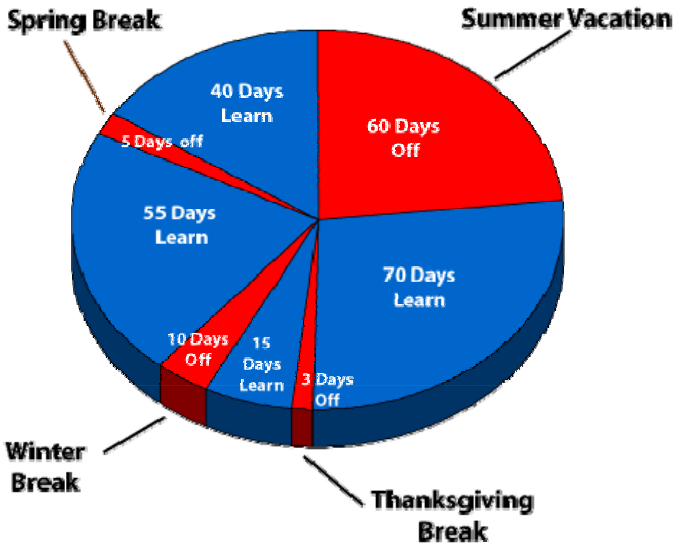
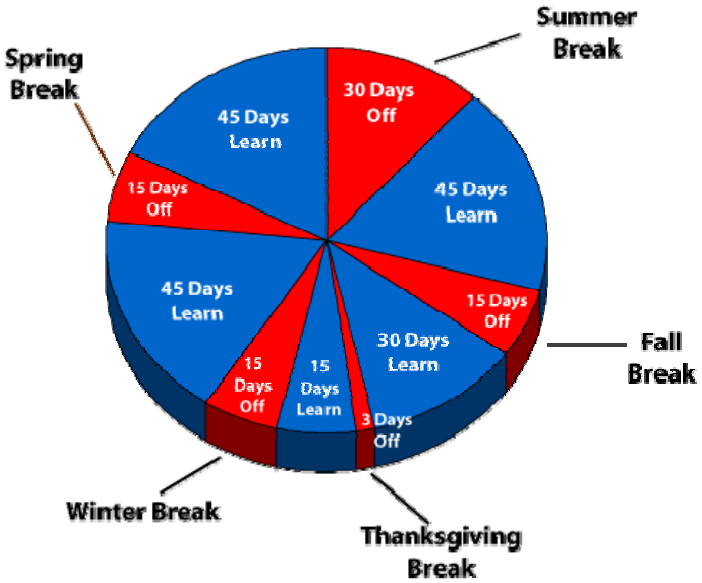
1. Alliance
2. Arleta
3. Astor
4. Atkinson
5. Beaumont
6. Benson HS
7. Cleveland HS
8. Community Transition Center
9. Franklin HS
10. George
11. Grant HS
12. Gray
13. Hosford
14. Jackson
15. Jefferson HS
16. Jefferson Young Womens
17. Lane
18. Lincoln HS
19. Madison HS
20. Marshall HS - BizTech
21. Marshall HS - Pauling Academy
22. Marshall HS - Renaissance Arts Academy
23. Mt. Tabor
24. Roosevelt HS - ACT
25. Roosevelt HS - POWER
26. Roosevelt HS - SEIS
27. Roseway Heights
28. West Sylvan/East Sylvan
29. Wilson HS
30. Winterhaven

2009-10 schools following TRIMESTER Calendar:

1. Abernethy
2. Access
3. Ainsworth
4. Alameda
5. Beach
6. Beverly Cleary
7. Boise-Eliot
8. Bridger
9. Bridlemile
10. Buckman
11. Capitol Hill
12. Chapman
13. Chief Joseph
14. Clark-Binnsmead
15. Clarendon-Portsmouth
16. Creative Science
17. Creston
18. da Vinci
19. Duniway
20. Faubion
21. Forest Park
22. Glencoe
23. Grout
24. Hayhurst
25. Humboldt
26. Irvington
27. James John
28. Kelly
29. King
30. Laurelhurst
31. Lee
32. Lent
33. Lewis
34. Llewellyn
35. Maplewood
36. Markham
37. Marysville
38. MLC
39. Ockley Green
40. Odyssey
41. Peninsula
42. Richmond
43. Rieke
44. Rigler
45. Rosa Parks
46. Sabin
47. Scott
48. Sellwood
49. Sitton
50. Skyline
51. Stephenson
52. Sunnyside
53. Vernon
54. Vestal
55. Whitman
56. Woodlawn
57. Woodmere
58. Woodstock

APPENDIX C

Traditional Calendar



Balanced Calendar