



PORTLAND PUBLIC SCHOOLS
OFFICE OF PARTNERSHIPS AND ENGAGEMENT

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Date: April 23, 2019

To: PPS Policy and Governance Special Committee:
Julia Brim-Edwards, Chair; Amy Kohnstamm; Rita Moore; Mike Rosen

CC: Guadalupe Guerrero, Superintendent; Stephanie Soden, Executive Chief of Staff;
Claire Hertz, Deputy Superintendent for Business and Operations; Liz Large,
Interim General Counsel

From: Jonathan Garcia, Chief Engagement Officer

Subject: Board Policies Re: District Fundraising Efforts

Background

In 1994, the Portland Public Schools Board of Education adopted Board Policy 7.10.030-P “District Foundation,” making way for the creation of the Portland Public Schools Foundation (PPSF), an entity whose main focus was to raise philanthropic dollars on behalf of the school district. This included supporting and establishing the Local School Foundation (LSF) model, supporting and elevating the campaigns for new bond and levy revenues, and providing direct grants management support to PPS.

That same year, the Board of Education also adopted a set of principles to guide the operation of foundation activities. These Guiding Principles were later updated two times (in 1998 and 2007) and continue to guide how LSFs are to be managed.

As an auxiliary nonprofit organization of PPS, the PPSF continued to serve the sole interests of Portland Public Schools until 2008, when the organization expanded its services to seven school districts in the Greater-Portland area. In 2010, the organization rebranded itself to All Hands Raised (AHR), and the operational function of supporting and managing the LSFs became a division of their work. AHR continues to provide fiscal oversight and program management support for the PPSF, including support to LSFs and the stewardship of the PPS Parent Fund.

In an effort to coordinate fundraising efforts across PPS, Superintendent Guerrero and the Office of Strategic Partnerships and Community Engagement are (re)establishing a new fundraising vehicle—The Fund for Portland Public Schools—which will serve as the primary (not exclusive) vehicle for creating, coordinating and facilitating public, private, and philanthropic partnerships that foster opportunities and benefits for students of PPS. It will also be responsible for stewarding, augmenting and supporting local school foundation efforts in PPS.

Updates to Board Policies and Administrative Directives

In keeping with the spirit of Board Policy 7.10.030-P "District Foundation," PPS staff interpret such policy to suggest that a nonprofit entity can be established and incorporated "for the purposes of accepting, holding and administering funds and gifts to the district for special and general purposes." This is the intent of The Fund for Portland Public Schools.

For over 25 years, Portland's parent, philanthropic and business communities stepped up in significant ways to support their local school communities through fundraising. During these 25 years, few substantive changes were made to policies, guiding principles and administrative procedures (1994, 1998, 2007) for the LSF fundraising efforts.

To ensure a smooth transition of the administrative management of the LSFs, we propose to transfer the managerial responsibilities by end of the current fiscal year. In the Fall of 2019, the Office of Strategic Partnerships and Community Engagement, in close partnership with the Board of Education's Policy and Governance Special Committee and The Fund for Portland Public Schools' Board of Directors, will create an engagement plan to involve parents and community members to examine and advise the LSF program and determine areas that need updating and potential improvements. The updated policies and corresponding administrative directives, once finalized, will serve as a set of recommendations for how the PPS Board of Education and The Fund for PPS' Board of Directors update the governing policies and operations related to district and school fundraising efforts at PPS.

By June 2019, we will present a comprehensive engagement plan to this committee that articulates the set of policies, principles and directives that we propose reviewing with community. This includes, but will not be limited to:

- How funds raised from LSFs are allocated and utilized;
- The first \$10,000 exemption;
- The 2/3-1/3 split on dollars raised in support of staffing (FTEs)
- The PPS Parent Fund Formula

Prior to the presentation to the PPS Policy and Governance Special Committee, staff will coordinate with the Board of Education to identify additional areas that should be considered in the Fall 2019.

Attachments

- Answers to Frequently Asked Questions
- PPS Foundation Board Policies and Guiding Principles
- List of active local school foundations, including the independent foundations
- 2019-2020 PPS Parent Fund Formula
- 2019-2020 PPS Parent Fund Awards

7.10.030-P District Foundation

The Board authorizes the establishment and incorporation of a foundation for the purposes of accepting, holding and administering funds and gifts to the district for special and general purposes. The purposes of funds administered by the foundation may include pay for instructional staff (FTE), educational enhancements such as equipment, supplies, extended day activities and contracts and other activities of benefit to the district and its students. It is the intent of the Board that the foundation be guided by priorities of equity, educational excellence, preservation of a strong public school system and support district wide implementation of the Oregon Educational Act for the 21st Century, district mission and goals. Both the Board and the foundation board of directors will receive annual evaluations for all funded projects.

The foundation will be incorporated under Oregon Revised Statutes and registered as a tax-exempt corporation under Section 501 of the Internal Revenue Service Code.

The foundation will be operated in conformance with established district wide foundation principles and governed by a board of directors whose selection, membership and functions will be set forth in the foundation's by-laws.

Legal References: ORS 294.305 - 294.565; ORS 332.107

History: Amd 9/9/02; BA 2422

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PORTLAND PUBLIC SCHOOLS

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BOARD OF EDUCATION

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Basil Panaretos
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Portland Public Schools Districtwide Foundation Principles

At the Board meeting of May 12, 1994, the Board adopted the following set of principles to guide the operation of foundation activities:

1. Portland School District will establish a districtwide foundation.
2. Portland School District will allow local school foundations.
3. In the collection and distribution of funds, schools without a foundation will be treated fairly--the same as schools with a foundation.
4. In the solicitation of funds, local schools and the districtwide foundation may appeal to any and all potential donors.
5. Funds raised by the local school foundations and the Districtwide Foundation may be used to pay for instructional staff (FTE), educational enhancements, such as equipment, supplies, extended day activities, and contracts.
6. Funds raised by local school foundations will be apportioned on a 2:1 ratio (67% to the local school and 33% to the Districtwide Foundation).
7. The use of funds at the local school level will be decided by the principal, site council, LSAC, or other advisory body as appropriate.
8. The foundations will have no control over personnel decisions.
9. The funding decisions of the districtwide and school foundations will be made after the Board budget decision--in time for planning for the coming academic year.
10. The Districtwide Foundation will continue indefinitely.
11. The allocation formula referred to in item 6 will be reviewed annually.
12. All policies relating to fundraising shall be reconsidered, and the apportionment formula in item 6 and any use of local funds to pay for instructional staff under item 5 shall be terminated, with respect to any fiscal year in which the anticipated ratio of general fund dollars to student enrollment, adjusted for inflation, exceeds the ratio that existed in fiscal year 93/94.
13. Nothing in these principles is intended to change existing district practices, policies or regulations related to fundraising.

Guidelines for Fundraising/Gifts Effective July 1, 1998

1. Foundations are the only approved vehicle for fundraising efforts to "buy" staff for schools.
 - a. Definition of staff: 1. FTE – Any position that would normally be filled by a certificate or classified employee of Portland Public Schools under State Law and current labor contracts; 2. Any individual providing a service which is part of the core instructional program of the school or for which academic credit will be granted to students or staff by their reception of that service.
 - b. Questions regarding whether or not a position falls within this definition shall be directed to the Office of the Superintendent. Any waivers or exceptions to this definition must be granted by the Superintendent and documented in the record.
2. The first \$5,000 per fiscal year raised by any local foundation is exempted from the mandatory 1/3 – 2/3 split. All local foundation money or money designated for a particular school through the Portland Public Schools Foundation that exceeds the \$5,000 exemption shall be split with the PPS foundation according to the 1/3 – 2/3 formula.
3. As per existing (Board Policy 7.10.021) administrative regulations, the approval of the Superintendent is required for acceptance of any support of \$5,000 or more in a given year by a school from any one source*.
4. Funds otherwise raised outside of the Foundation activities will not be subject to the 1/3 – 2/3 split, as long as they are not used to "buy" staff. "Buying" staff can only be done by submitting funds to the local school foundation or the PPS Foundation, and would then be subject to the 1/3 – 2/3 split, as outlined in guidelines 1 and 2 above.
5. Foundation purchases of "staff" are for positions, not for specific individuals. However, Foundations will pay the actual cost of the employee filling that position as determined by the staffing established based on the October enrollment data, plus the 1/3 for the PPS Foundation.

*Sources would include but not be limited to Foundations, PTA, Booster Club, Endowments, corporate partnerships, alumni groups, etc. The support may be in dollars or in the form of goods, equipment, or labor.

- a. The District will provide an estimated salary range for specific positions to help foundations to set fundraising goals.
 - b. The District will send the foundation a bill by the end of October for the actual amount owed.
 - c. The District prefers that these bills for "staff" buys be paid in full within 30 days after the bill is received. However, payment schedules may be negotiated on a case-by-case basis.
 - d. Should a foundation fall short in payment for a position, the District will charge the short fall against the next years' fundraising efforts. Until the obligation is paid in full, no new positions may be funded.
6. In accordance with the original Board of Education Foundation Principles, adopted May 12, 1994, the School Board will annually review the practice and appropriate level of the "equity" split.

THESE GUIDELINES WILL GO INTO EFFECT UPON ADOPTION BY THE BOARD FOR THE 1998-99 SCHOOL YEAR. ALL PREVIOUS EXCEPTIONS, WAIVERS, GRANDFATHERED FUNDS, ETC. WILL NO LONGER APPLY.

October 12, 1998

Adoption of Guidelines
Portland Public Schools Foundation and Local School Foundations
1998-1999 School Year

9577 RESOLVED, That the Board of Education adopts the following guidelines for fundraising/gifts by the Portland Public Schools Foundation and local school foundations; and be it further

RESOLVED, That these guidelines will go into effect upon adoption by the Board for the 1998-1999 school year. All previous exceptions, waivers, grandfathered funds, etc. will no longer apply.

Guidelines for Fund raising/Gifts Effective July 1, 1998

1. Foundations are the only approved vehicle for fundraising efforts to "buy" staff for schools.
 - a. Definition of staff. 1. FTE - Any position that would normally be filled by a certificate or classified employee of Portland Public Schools under State Law and current labor contracts; 2. Any individual providing a service which is part of the core instructional program of the school or for which academic credit will be granted to students or staff by their reception of that service.
 - b. Questions regarding whether or not a position falls within this definition shall be directed to the Office of the Superintendent. Any waivers or exceptions to this definition must be granted by the Superintendent and documented in the record.
2. The first \$5,000 per fiscal year raised by any local foundation is exempted from the mandatory 1/3 - 2/3 split. All local foundation money or money designated for a particular school through the Portland Public Schools Foundation that exceeds the \$5,000 exemption shall be split with the PPS foundation according to the 1/3 - 2/3 formula.
3. As per existing (Board Policy 7.10.021) administrative regulations, the approval of the Superintendent is required for acceptance of any support of \$5,000 or more in a given year by a school from any one source*.
4. Funds otherwise raised outside of the Foundation activities will not be subject to the 1/3 - 2/3 split, as long as they are not used to "buy" staff. "Buying" staff can only be done by submitting funds to the local school foundation or the PPS Foundation, and would then be subject to the 1/3 - 2/3 split, as outlined in guidelines 1 and 2 above.
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*Sources would include but not be limited to Foundations, PTA, Booster Club, Endowments, corporate partnerships, alumni groups, etc. The support may be in dollars or in the form of goods, equipment, or labor

October 12, 1998

- a. The District will provide an estimated salary range for specific positions to help foundations to set fundraising goals.
- b. The District will send the foundation a bill by the end of October for the actual amount owed.
- c. The District prefers that these bills for "staff" buys be paid in full within 30 days after the bill is received. However, payment schedules may be negotiated on a case-by-case basis.
- d. Should a foundation fall short in payment for a position, the District will charge the short fall against the next years' fundraising efforts. Until the obligation is paid in full, no new positions may be funded.
6. In accordance with the original Board of Education Foundation Principles, adopted May 12, 1994, the School Board will annually review the practice and appropriate level of the "equity" split.

December 10, 2007

RESOLUTION No. 3820

Resolution to Raise Portland Schools Foundation Equity Fund Exemption to \$10,000

RECITALS

- A. In 1998, the Board of Education ("Board") adopted resolution 9577, which outlined Portland Public Schools ("District") guidelines for fundraising/gifts by local school foundations. One of the guidelines stated that all local foundation money designated for a particular school would be split with the Portland Schools Foundation according to a 2/3 - 1/3 formula (67% would go to the local school and 33% would go to the district-wide foundation equity fund), with the first \$5,000 being exempt.
- B. An Equity Fund Review Committee was convened in 2007 by the Portland Schools Foundation and included representatives from the District. Among the recommendations from the committee was a suggestion to increase the current exemption from \$5,000 to \$10,000. In response to this request, the Superintendent from the District and the Student Support and Community Relations Committee recommend that the Board change the District's guidelines to reflect this higher exemption.

RESOLUTION

The Board directs the District and the Portland Schools Foundation to update the current \$5,000 exemption to a \$10,000 exemption. Commencing January 1, 2008 all local foundation money or money designated for a particular school through the Portland Schools Foundation will be apportioned to the Portland Schools Foundation according to a 2/3 - 1/3 formula (67% would go to the local school and 33% would go to the district-wide foundation equity fund), with the first \$10,000 being exempt.

2018-19 Active PPS Local School Foundations

Affiliated PPS Local School Foundations

Abernethy Elementary School	Lewis Elementary School
Access Academy	Llewellyn Elementary School
Alameda Elementary School	Maplewood Elementary School
Atkinson Elementary School	Metropolitan Learning Center
Beach Elementary School	Mt. Tabor Middle School
Beaumont Middle School	Richmond Elementary School
Beverly Cleary K-8	Rieke Elementary School
Buckman Elementary School	Roseway Heights K-8
Capitol Hill Elementary School	Sabin PK-8
da Vinci Arts Middle School	Sellwood Middle School
Franklin High School	Skyline Elementary School
Glencoe Elementary School	Stephenson Elementary School
Grant High School	Sunnyside Environmental K-8
Gray Middle School	Vernon K-8
Hosford Middle School	Wilson High School
Irvington K-8	Woodstock Elementary School
Laurelhurst K-8	

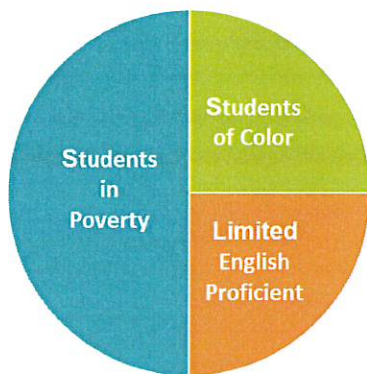
Independent PPS Local School Foundations

Ainsworth Elementary School	Duniway Elementary School
Bridlemile Elementary School	Forest Park Elementary School
Chapman Elementary School	Lincoln High School
Cleveland High School	West Sylvan Middle School



2019-2020 PPS Parent Fund Grant Formula

School Demographics + School Finances = Final Ranking



$$\begin{array}{l}
 18-19 \text{ Title I } \times .33 \\
 17-18 \text{ PTA Net \$} \\
 17-18 \text{ LSF Net \$} \\
 18-19 \text{ Parent Fund \$} \\
 \text{\# of Students}
 \end{array}
 +
 =
 \text{School Ranking}$$

Note: PPS Parent Fund grant awards to alternative schools are determined by PPS staff and are not subject to the formula calculations.

DEFINITIONS

Students in Poverty: Number of students reported by PPS for the 2018-19 school year who are in poverty under the direct certification formula.

Students of Color: Number of students reported by PPS as of October 1, 2018 who identify as Hispanic, African American, Asian, Native American, Pacific Islander or Multiple Race.

Limited English Proficient: Number of students reported by PPS as of October 1, 2018 who are identified as having limited English proficiency.

Title 1: Amount of School Based Title 1 funding received by the school in 2018-19 as reported by PPS, counted at .33.

PTA Net: Total PTA dollars raised, minus fundraising and operational expenses, for the 2017-18 school year as reported by the individual PTA's. Discretionary expenditures (programming, supplies, materials, etc.) are not deducted from the total. Failure to provide this information will disqualify a school from consideration for a grant.

LSF Net: Total Local School Foundation dollars raised, minus fundraising and operational expenses, for the 2017-18 school year.

PPSP EFG: Amount of PPS Parent Fund grant award received in 2018-19, if any.

all hands raised



2019-20 PPS Parent Fund Awards--Powered by New Seasons***

PPS School	Award Amount	Final Rank	Total Ranking	Demographic Rank	Financial Rank
Roosevelt HS	\$53,000	1	22	17	5
Harriet Tubman MS	\$53,000	2	24	23	1
Madison HS	\$53,000	3	25	21	4
Lent K-8	\$49,000	4	31	9	22
Benson HS	\$49,000	5	35	32	3
Ockley Green MS	\$42,000	6	38	25	13
Harrison Park K-8	\$42,000	7	39	8	31
Whitman ES	\$42,000	7	39	11	28
Franklin HS	\$40,000	9	41	35	6
Grout ES	\$40,000	9	41	27	14
Roseway Heights	\$40,000	11	42	22	20
Scott K-8	\$35,000	12	45	7	38
Bridger K-8	\$35,000	13	47	28	19
Rose City Park	\$35,000	13	47	40	7
Jefferson HS	\$32,000	15	49	26	23
Marysville K-8	\$32,000	15	49	12	37
Astor K-8	\$32,000	17	50	38	12
Kelly ES	\$32,000	17	50	16	34
Arleta K-8	\$32,000	19	51	36	15
George MS	\$32,000	19	51	4	47
Hosford MS	\$30,000	21	53	44	9
Markham ES	\$30,000	21	53	29	24
Beaumont MS	\$30,000	23	54	33	21
Faubion PK-8	\$30,000	24	55	15	40
Lane MS	\$30,000	24	55	14	41
César Chávez K-8	\$25,000	26	56	2	54
Sitton ES	\$25,000	26	56	5	51
Rosa Parks ES	\$25,000	28	57	1	56
Mt Tabor MS	\$25,000	29	58	47	11
Woodmere ES	\$25,000	30	59	13	46
Grant HS	\$20,000	31	61	59	2
Rigler ES	\$20,000	31	61	3	58
Woodstock ES	\$20,000	33	62	37	25
Boise-Eliot/Humboldt PK-8	\$20,000	34	63	6	57
Creston K-8	\$20,000	34	63	34	29
Peninsula ES	\$20,000	34	63	31	32
Woodlawn PK-5	\$20,000	34	63	18	45
TOTAL	\$1,215,000				

PPS School	Final Rank	Total Ranking	Demographic Rank	Financial Rank
Wilson HS	38	65	57	8
Jackson MS	39	66	50	16
Vernon K-8	40	67	41	26
Jason Lee K-8	41	68	19	49
Vestal K-8	41	68	24	44
Chief Joseph ES	43	69	39	30
Cleveland HS	43	69	51	18
MLK Jr. PK-8	43	69	10	59
Atkinson ES	46	70	43	27
James John ES	46	70	20	50
Sellwood MS	48	70	60	10
Lewis ES	49	72	55	17
Creative Science K-8	50	84	48	36
da Vinci Arts MS	50	84	49	35
Sabin K-8	50	84	45	39
Glencoe ES	53	89	56	33
Beach ES	54	90	30	60
Gray MS	55	95	52	43
Hayhurst ES	55	95	53	42
Buckman ES	57	99	46	53
Irvington K-8	58	104	42	62
Bridlemile ES	59	106	58	48
Rieke ES	60	114	62	52
Ainsworth ES	61	115	54	61
Llewellyn ES	62	116	61	55

PPS Parent Fund:	Award*
Alternative Schools	
NAYA Early College Academy	\$12,800
Rosemary Anderson POIC	\$12,800
Alliance High School	\$12,800
Youth Progress	\$12,800
Kairos PDX	\$12,800

* PPS Parent Fund grant awards to alternative schools are determined by PPS staff and are not subject to the formula calculations. Total award to alternative schools is \$64,000.

**Special thanks to the foundations at alternative programs Metropolitan Learning Center and ACCESS Academy for their contributions to the PPS Parent Fund.

***2019-2020 PPS Parent Awards total \$ 1,279,000.

Schools Withdrawing Consideration:
Abernethy ES
Alameda ES
Beverly Cleary K-8
Capitol Hill ES
Chapman ES
Duniway ES
Forest Park ES
Laurelhurst K-8
Lincoln HS
Maplewood ES
Richmond ES
Skyline K-8
Stephenson ES
Sunnyside Env. K-8
West Sylvan MS
Winterhaven K-8

Answers to Frequently Asked Questions (FAQs)
The Fund for Portland Public Schools and
the Transfer of Administrative Responsibilities of the PPS Local School Foundations

Historical Context

When and how was the Portland Public Schools Foundation (PPSF) established?

The PPSF was formed in 1994, as a result of the PPS Board of Education adopting Board Policy 7.10.030-P, "District Foundation." This policy gave way for the establishment of the Portland Public Schools Foundation, an entity focused on raising philanthropic dollars on behalf of the District, supporting and establishing the Local School Foundation (LSF) model, supporting and elevating the campaigns for new bond and levy revenues, running fundraising campaigns and providing grants management in support of PPS. On May 12 of that year, the Board of Education also adopted a set of principles to guide the operation of foundation activities. These principles were updated two times (in 1998 and 2007). These Guiding Principles continue to serve as the basis for how LSFs are managed. **[SEE ATTACHMENT #1]**

When did the Portland Public Schools Foundation (PPSF) name change to All Hands Raised?

When PPSF rebranded itself to All Hands Raised (AHR) in 2010, the PPSF program became a division (and not the sole focus) of AHR. This was done in collaboration with community partners who asked and elected AHR to lead a Multnomah County local cradle to career initiative, resulting in an associated rebranding process (at the direction of six partner superintendents, including PPS) to reflect the countywide collective impact work AHR was increasingly doing to address racial inequities. At that time, AHR also re-committed, at the request of the PPS administration, to continue operating the PPSF as a division of AHR. As such, AHR currently provides fiscal oversight and program management services for the PPSF, including support to LSFs and the stewardship of the PPS Parent Fund. In collaboration with the PPS Superintendent and his senior staff, AHR is transitioning the oversight of the PPSF Program to PPS effective July 1, 2019.

Why is this hand-off happening now?

Portland Public Schools (PPS) is involved in an exciting period of change. In the fall of 2017, Guadalupe Guerrero began his tenure as the District's new Superintendent, with a focus on orienting Portland's school system toward a 21st century system that provides all students with an equitable, inspired, intellectually rigorous educational experience to prepare them to succeed and thrive. In the fall of 2018, Superintendent Guerrero and the Board of Education launched an ambitious process to develop a community informed vision for the future of public education in Portland. Once finalized in June 2019, this vision will provide a framework to continue the strategic transformation of our school system over the next decade.

Our vision—the District's community promise—will continue to require a well-coordinated effort involving multiple stakeholders throughout the region. It will encourage business, philanthropic, and civic leaders to become inspired and take action to support, contribute, and hold themselves accountable for better outcomes for all public school students in PPS. To build on this coordinated effort, Superintendent Guerrero established the Strategic Partnerships department with a focus on building and accelerating the identification, cultivation, and strengthening of strategic relationships with those who will serve as investment partners in a citywide movement to create a world-class public school system.

Under the guidance of the Strategic Partnerships team, PPS is moving forward with establishing a new nonprofit fundraising vehicle, The Fund for Portland Public Schools (The Fund for PPS).

The Fund for Portland Public Schools

What is The Fund for Portland Public Schools?

The Fund for PPS will serve as PPS's backbone organization solely focused on strengthening and expanding private and philanthropic investments on behalf of the District, which will be closely aligned to the organization's vision, strategic plan and critical areas. The Fund for PPS will have an independent Board of Directors, serving as advocates and advisors to the Superintendent and the Board of Education on items related to business and philanthropic investments. Activities led by the 501(c)(3) entity will be executed by the existing Strategic Partnerships team. An additional staff member will be added, serving as a coordinator of the LSF efforts, including providing support in accounting, database and records management. Funding will come from private investments. To formalize the relationship between PPS and The Fund for PPS, a Memorandum of Understanding will be developed and describe the responsibilities and expectations of the partnership to advance the interests of PPS. The District's new nonprofit fundraising vehicle will serve as the primary, but not exclusive, pathway for investing in PPS. By establishing this new vehicle, we will:

1. facilitate direct alignment to maximize impact and scale;
2. build robust accountability structures and transparent financial records;
3. utilize existing internal operations to minimize operational and implementation costs;
4. leverage the assets of the various influential philanthropic and community leaders of the nonprofit's board of directors.

The Fund for PPS is modeled after many institutions of higher education, both in approach and structure. For example, The University of Oregon Foundation is the 501(c)(3) auxiliary organization of the University of Oregon that coordinates financial investments to assist the university in meeting its educational mission. The University Advancement Team at the University of Oregon leads these efforts to create awareness, build long-term relationships, and facilitate charitable giving.

Is All Hands Raised Going Away?

No. All Hands Raised serves a broader role in the community as the entity charged by leaders with implementing a local collective impact initiative with an explicit focus on racial equity, improving education outcomes for Multnomah County's 220,000 children, youth and young adults. This is the primary focus of All Hands Raised. They will continue this focus on improving educational outcomes with PPS, as well as with other districts and entities from throughout the county. For more information visit: allhandsraised.org.

PPS Local School Foundations & PPS Parent Fund

Which PPS schools currently have active LSFs (independent and affiliated)?

There are currently 42 school communities with active LSFs. This includes 8 independent school foundations--nonprofit organizations with independent jurisdiction and oversight by an independent board of directors. [SEE ATTACHMENT #2]

When and how will services to PPS Local School Foundations change?

The entity delivering these services will change. All Hands Raised has begun the transition of providing the tools we need to continue to effectively manage and steward LSFs funds on behalf of PPS parents and the PPS Parent Fund. In addition, accounting services including the issuance of monthly reports to LSFs, cash collection, loaned credit swipers, bulk mailing options, insurance coverage along with other accounting services provided to affiliated PPS LSFs will remain intact. The administrative management of the LSFs will be transferred to The Fund for PPS effective July 1, 2019. PPS, The Fund for PPS and AHR will continue to collaborate after that date to ensure a seamless transition for PPS LSFs.

Will there still be donation forms available to download, credit card swipers available, bulk mail printing options, insurance, and general bookkeeping under the new entity?

Yes. Donation forms will be available on FundforPPS.org. Swipers, bulk printing options, insurance and general bookkeeping will be provided by The Fund for PPS.

Will the funds raised by LSFs continue to be used to support their individual school communities?

Yes. The intent of the funds raised for staffing positions by parents through LSFs will be honored. As a guiding principle, The Fund for PPS and Portland Public Schools value the importance of donor intent and will continue to be the stewards of these funds raised by school in that manner.

Will there be a difference between the LSF model within AHR and The Fund for PPS?

The Fund for PPS will provide the same administrative management that AHR has been providing, effective July 1, 2019:

- PPS parents volunteer their time to raise funds to support staffing through their LSFs. These funds will be forwarded from the LSFs to The Fund for PPS.
- Donations received by The Fund for PPS (whether by mail, in person or from The Fund for PPS's online donation page) will be deposited directly into that LSF's account. The Fund for PPS will provide fiscal management of these funds, including monthly financial reports to all active LSFs.
- The Fund for PPS will calculate each foundation investment in the PPS Parent Fund (1/3 of all funds raised after the first \$10,000 raised). Using a data-informed formula that takes into account school demographics and financial information, The Fund for PPS will award PPS Parent Fund grants, which will be administered by PPS. **[SEE ATTACHMENT #3]**
- At the end of each fiscal year, one-hundred percent of the remaining balance, after the PPS Parent Fund grants will be deducted, and transferred directly to the school's account at PPS to fund positions approved by the principal and their supervisor.

What is the PPS Parent Fund and what is the process for how these funds are distributed to schools? What will be different in how the The Fund for PPS manages these funds in the future?

Known as the PPS Parent Fund, this fund serves as a set aside of the one-third raised (after the first \$10,000) by LSFs. These funds are stewarded and distributed to high-need schools using a data-driven formula. This formula includes school demographics (% of students in poverty, % students of color and % emerging bilingual students) and school finances (including Title I, PTA, LSF and previous parent fund dollars) which total to determine ranking. AHR, using this data-driven formula, determined the PPS Parent Fund distributions for the 2019-20 school year. **[SEE ATTACHMENT #4]**

Will PPS and The Fund for PPS consider updating the policies, procedures, formulas, etc.?

For over 25 years, Portland's parent, philanthropic and business communities have stepped up in huge ways to support their local school communities through fundraising. During these 25 years, there have been few substantive changes made to policies, guiding principles and administrative procedures (1994, 1998, 2007) for the LSF fundraising efforts. To ensure a smooth transition of the administrative management of the LSFs, we have agreed, in turn-key style, to transfer as is. In the Fall of 2019, we will work with parents and community members to examine the LSF program and determine areas for continuous improvement. This will culminate in a set of recommendations from The Fund for PPS' board of directors to the PPS Board of Education. It will be a joint effort to determine appropriate shifts, if any, to both PPS Board of Education's policies and The Fund for PPS' operations.