



PORTLAND PUBLIC SCHOOLS




Growing Great Schools: Enrollment Balancing

Update to School Board
December 1, 2015



Tonight's agenda

- Overview
 - Progress report: PSU Center for Public Service recommendation, September 2014
 - Enrollment balancing challenges/opportunities
 - Scenarios to right-size school
 - Community feedback to date
- Board questions and dialogue



Process Recommendations from PSU Center for Public Service

- ✓ **Step I:** Values and Core
- ✓ **Step II:** Decision-Making
- **Step III:** Boundary Maps and Framework
- **Step IV:** Formal Adoption of New
Boundaries and Long-Term Boundary
Review Framework



Recommendations from PSU Center for Public Service

- **Recommendation:** PPS should establish a District-wide Boundary Review Advisory Committee (D-BRAC) that reports to the Superintendent and is charged with monitoring and evaluating enrollment issues and proposing changes, as necessary.
- **Recommendation:** Develop a comprehensive and user-friendly website to support community engagement.
- **Recommendation:** Ensure baseline program offerings are provided at every school and available to every student.
- **Recommendation:** Engage the community to establish values that will guide and influence PPS's decisions across programs and departments.



So why are we here?

- Enrollment is steadily growing.
- This creates the opportunity to solve enrollment and building capacity challenges district-wide to better serve all students.
- The goal of this process is to have strong schools in every neighborhood.



So why are we here?

There is a widely held belief that boundary review can be an effective tool in “right-sizing” schools in order to create more equitable offerings under the current staffing formula.

-PSU Center for Public Service, September 2014



The funding equation

**Enrollment = Dollars = Teachers =
Core program**



Factors that matter: Preferred enrollment to offer core program

- **K-8 Schools:**
 - 3 sections* per grade
 - 2 sections per grade can work but doesn't protect against annual enrollment fluctuation.
- **K-5 Schools:**
 - 3-4 sections per grade
 - 2 sections per grade can also work but doesn't protect against annual enrollment fluctuation.
- **Middle Schools:**
 - A minimum of 450 students
 - Assumes that middle schools have 2-4 K-5 feeder schools

**Section: # of classrooms at each grade level, such as three 5th grades*



Factors that matter: Enough space

An ideal school has enough classrooms to:

- Fit all the students and the teachers needed to offer the core program
- Meet students' needs, such as:
 - Rooms for special instruction where needed
 - Rooms for academic enrichments such as music or computer & science labs
 - Keep class sizes reasonable



Right-sized schools

(Funding + enrollment + program + space)

Right-sized schools have:

- Enough students to have...
- Enough teachers to offer...
- The core program in....
- Buildings with enough and appropriate space.



Challenge 1: Over-crowded schools

Many schools are over-crowded & enrollment is increasing in the future

- 11 schools were over-crowded in 2014-15
- PPS enrollment is expected to grow by 5,000 students in the near future
- If budgets improve, PPS will need additional facility space to hold more school staff and students
- Current over-crowding has resulted in expensive, short-term, one-off solutions to alleviate the crisis of the moment

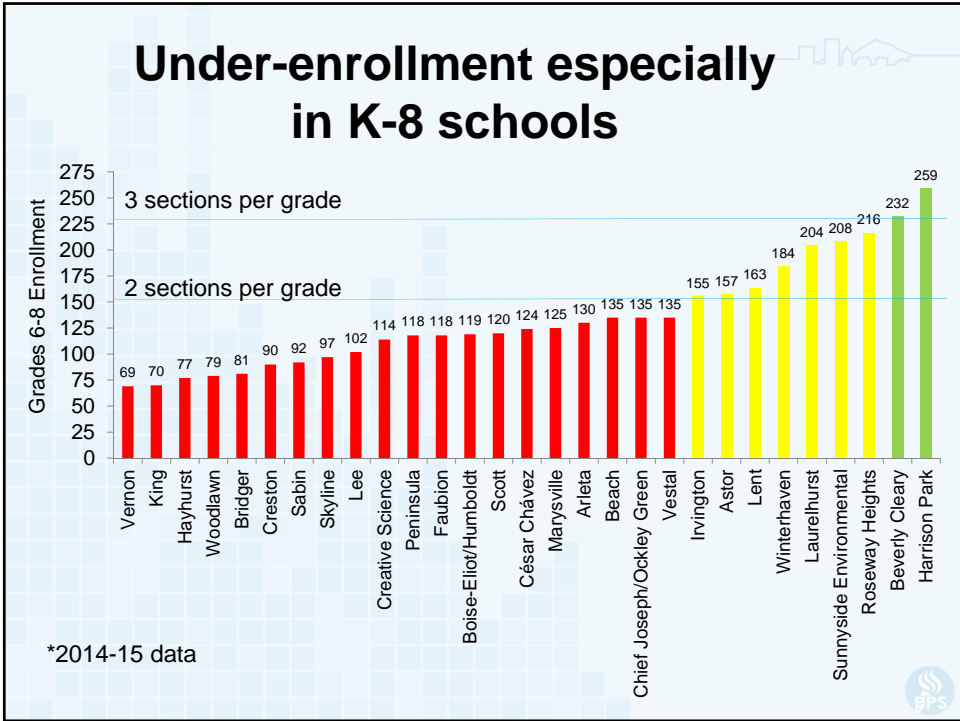


Challenge 2: Many schools are under-enrolled

Under-enrolled schools cannot sustainably offer the core academic program to all students

- 9 schools are under-enrolled (i.e. less than 2 sections per grade)
- 20 out of 29 K-8s are under-enrolled in grades 6-8
- Funds not intended to support the core academic program are being used to do so
- These include: District-allocated, equity staffing funds to schools with high percentages of historically underserved students, parent fundraising/school foundations or grants





Challenge 3: Many school buildings too small to fit preferred enrollment

Many K-8 buildings are not large enough to support preferred enrollment

- There are very few buildings that can hold 3 sections K-8s, especially for schools with large numbers of historically underserved students (which generate additional teachers, and therefore classrooms needed).

Meeting the challenge

PPS has presented two draft scenarios

- Both draft plans rethink the mix of K-8, K-5, middle schools; move boundaries and some special programs, and open buildings that were previously closed.
- Both are guided by the values prioritized by DBRAC – equity, access to programs, and healthy environment.



Draft scenarios are not...

- **Definitive plans for change.**
 - These are draft scenarios and we expect to work with you to improve them.
- **Lists of good or bad schools.**
 - Every school has exceptional professional educators and amazing students and families. These proposals offer ideas for strengthening schools to support the educators and students in all schools.
- **Preferred proposals.**
 - Both draft scenarios follow the values identified by D-BRAC and approved by the board; solve most enrollment problems, and can be implemented over time.

We are not asking you to pick the proposal you like best. We want to know what works and what doesn't in each in order to end up with the best path.



Features of Scenarios I & II

	Scenario I	Scenario II
Overall 51 schools are impacted	<ul style="list-style-type: none"> Convert 22 schools from K-8s into K-5s and middle schools. Boundary changes at 35 K through 8 level schools and at all high schools but Benson. Open buildings to accommodate growth including East Sylvan and Kellogg. 	<ul style="list-style-type: none"> Convert 16 schools from K-8s into K-5s and middle schools. Boundary changes at 36 K through 8 level schools and all high schools but Benson. Same as Scenario I.



What do the scenarios solve?

Preferred Enrollment to Support Core Program*		
Under-enrollment	Current	Scenario I & II
# of schools without enough students to support core educational program	9	1 (Skyline)

We need an average of two, 25-student classrooms, or sections, at each grade level to offer the full program, for total of 50 students per grade level.



What do scenarios solve?

Overcrowded Schools		
	Current	Scenarios I & II
# of school buildings over-crowded	11	1
% of students attending over-crowded schools	20%	1%
% of racially Historically Underserved students attending over-crowded schools	17%	1%



Community Feedback Meetings

- Meetings Completed:
 - Hosford – 400+ estimated attendance
 - Caesar Chavez – 200+
 - CIO Headquarters – 130+
 - West Sylvan – 200+
 - CIO Charles Jordan Center 175+
 - Latino Network Madison High School – 150+
 - APANO Headquarters – 175+
 - Roseway Heights – 500+
 - Markham – 50+
 - Lane – 200+
 - King – 300+
 - Total estimated attendance – 2500+



Community Feedback Meetings

- Administrator, Teacher and Student Meetings:
 - Held school administrator feedback session
 - Held two teacher input meetings at PAT headquarters. Over 100 teachers participated
 - Student meeting at Benson hosted by SuperSAC tomorrow night.



Community Feedback Meetings

- All meetings video recorded and posted
- Professional note taker at all meetings
 - Summaries and full comment record being provided to DBRAC
 - Summaries posted on website & e-mailed back to participants
- DBRAC Members in attendance
- Board Members, Superintendent, and/or Senior Staff have attended at all meetings.



Community Partner Outreach

- CIO
 - Cluster Coordinators gone out to 15 schools within the Jefferson, Madison and Roosevelt Clusters
 - Hosted 2 successful, well-attended meetings
 - Seeds of Change Conference - tabled
- Latino Network
 - Created postcard for Latino families about the DBRAC work and meeting
 - Tabled and distributed information at Latino Family Night
 - Hosted/Facilitated successful, well-attended meeting - Madison
 - Facilitated 1 meeting- Caesar Chavez
- APANO
 - Outreach to families in the Madison Cluster
 - Hosted/Facilitated successful well-attended meeting
 - Hosted meeting with APANO Ally group



Community Partner Outreach

- DLI Forum - tabled
- Black Parent Initiative
 - Outreach at BPI Parent University
 - We Are The Village Symposium- tabled
- NAYA
 - Outreach to Native families
- Neighborhood House in partnership with SW Neighborhood Associations
 - Outreach to SW community

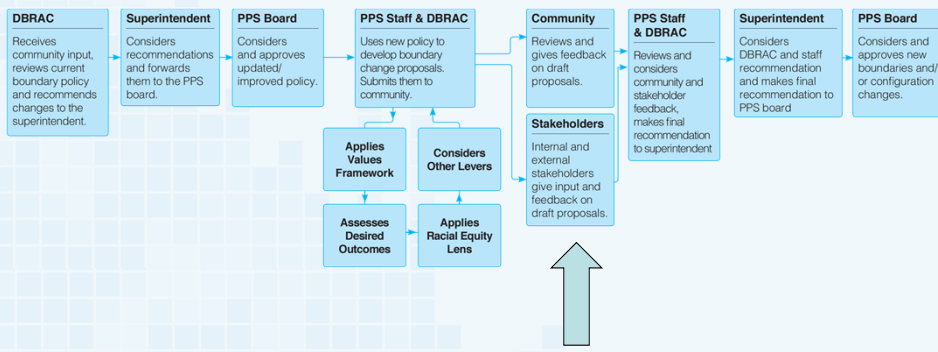


PPS Grows E-mail & Online Survey

- 500+ comments provided already to DBRAC
- Over 2,000 surveys completed




Enrollment Balancing Process




We are here.






PORTLAND PUBLIC SCHOOLS




Strategic Framework and Board Priorities

2015-16 and 2016-17



Background

- **Spring 2015**: As part of the Superintendent evaluation process, the Board and Superintendent developed priorities for the 2015-16 school year
- **Summer/Fall 2015**: The current Board reviewed and updated priorities and determined metrics over the course of three retreats in August, September and October



How are the priorities used?


- Focus and align work across the district
- Establish key metrics of system progress
- Develop work plans for Board Committees and staff
- Develop the 2016-17 Budget




Strategic Framework and Board Priorities

PORTLAND PUBLIC SCHOOLS Strategic Framework and Board Priorities for 2015-16 and 2016-17						
VISION	EQUITY and EXCELLENCE : Every student, every teacher, every school succeeding.					
MISSION	Every student by name , prepared for college, career and participation as an active community member, regardless of race, income or zip code.					
Values Guiding CULTURAL TRANSFORMATION	Equity	Excellence	Collaboration	Service	Accountability	Sustainability
I. EFFECTIVE EDUCATORS						
Board Priorities 2015-16 and 2016-17:	To be measured by:	Included in 2015-16 budget:	Executive Sponsor	Board Committee	Partners	
1. Ensure a strong principal and vice principal/assistant principal in every building who is well-matched to the school community.	<ul style="list-style-type: none"> Increase in satisfaction with schools reflected in annual school climate survey (students, teachers, parents) School based student achievement data 	<ul style="list-style-type: none"> Office of School Performance Coaching Support for Principals New Principal leadership support 	Antonio Lopez , Assistant Superintendent, Office of School Performance	Full Board Business and Operations Committee	District wide Screening Committee PAT Chalkboard Project Effective Principal	






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PPS VISION

EQUITY and EXCELLENCE

Every student,
every teacher,
every school
succeeding.

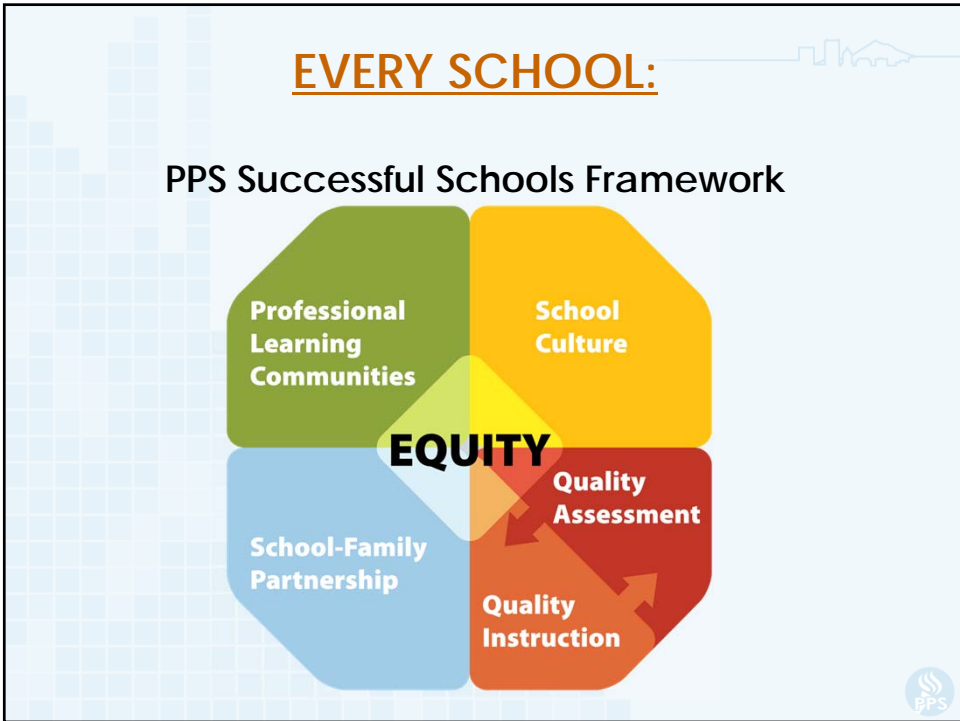
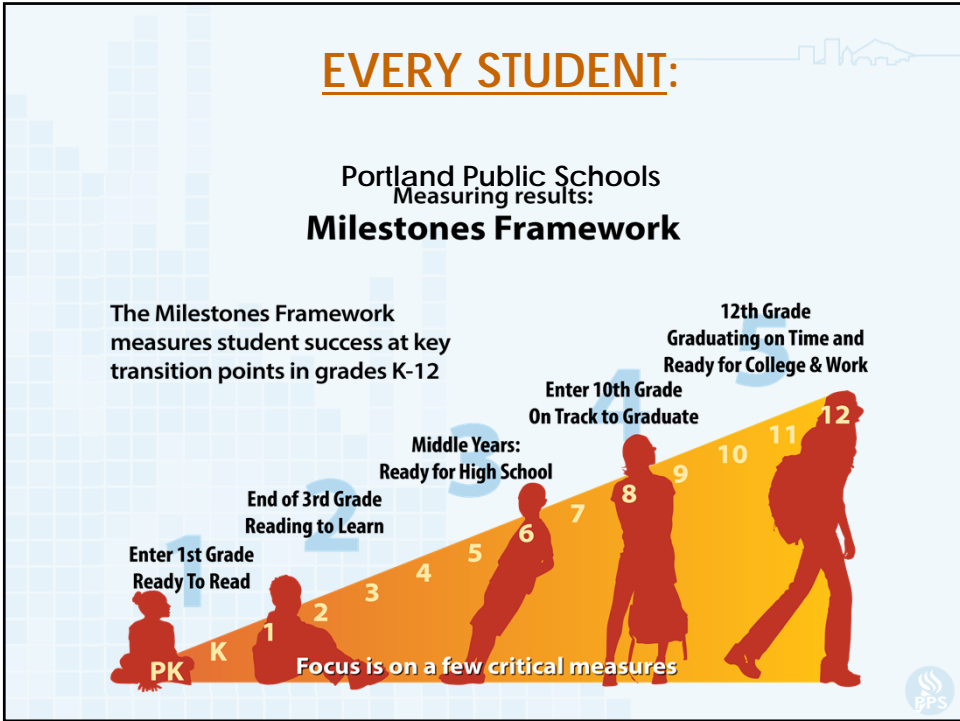


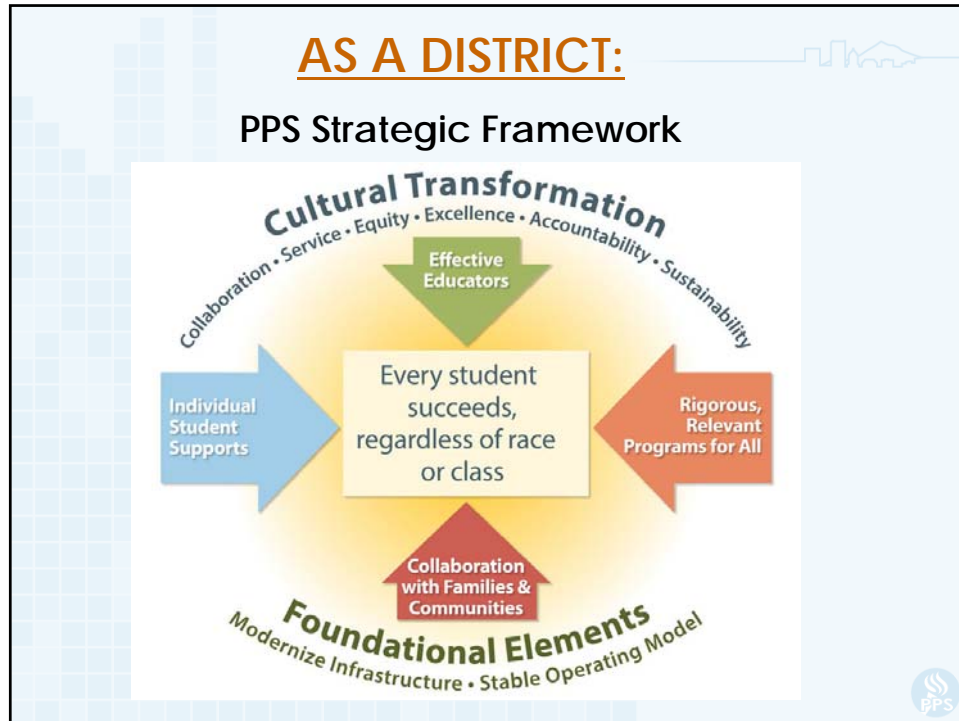
PORTLAND PUBLIC SCHOOLS



PPS MISSION

Every student by name,
prepared for college, career
and participation as an
active community member,
regardless of race, income or zip
code.





Board Priority #1:

Ensure a strong principal and vice principal/assistant principal in every building who is well-matched to the school community

Board Priority #2:

Create an environment in which supports are in place for teachers to thrive and have a voice in district-wide decision making



Board Priority #3:

Prepare students to be college and career ready



Board Priority #4:

Create a system of quality instruction to increase literacy rates for all children



Board Priority #5:

Create a system of behavior supports that will reduce disproportionality in expulsions and suspensions



Board Priority #6:

Ensure the bond continues tracking on time and on budget and delivers innovative 21st century schools



Board Priority #7:

Create a successful enrollment balancing framework that creates a foundation of equitable core programming across schools



2015 PROPERTY TAX UPDATE

DAVID WYNDE
DEPUTY CFO & BUDGET DIRECTOR
NOVEMBER 19, 2015

Property Taxes

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- Three Counties
- Four Taxes
- Assessed Value
- Urban Renewal
- Compression
- Collection Rates
- Revised Estimates for 2015

Three Counties

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- Portland Public Schools has taxable property in three Oregon counties. Relative Value indicated by Assessed Value:

□ Multnomah	\$50,451 million	99.3%
□ Washington	\$ 322 million	0.6%
□ Clackamas	\$ 39 million	0.1%

Four Taxes

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- Permanent Rate. \$4.7743/\$1,000 assessed value. Shared statewide through state school fund equalization.
- Gap Rate. \$0.5038/\$1,000 assessed value. Portion of permanent rate levy exempted from state school fund equalization.
- Local Option. \$1.99/\$1,000 assessed value. Exempted from state school fund equalization.
- Capital Bond. \$1.0951*/\$1,000 assessed value. Funds debt service on capital bonds.

* Capital bond is a levy not a rate; the rate shown here is the 2015 number.

Assessed Value

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- Growth in assessed value limited to 3% under property tax limitation measures (Measures 5, 45 and 50), except for reassessed and new property.
- Actual Growth:

Tax Year	AV Growth as %	Tax Year	AV Growth as %
2015	4.67%	2010	3.09%
2014	4.22%	2009	4.71%
2013	3.52%	2008	5.17%
2012	2.87%	2007	5.90%
2011	2.80%	2006	4.35%

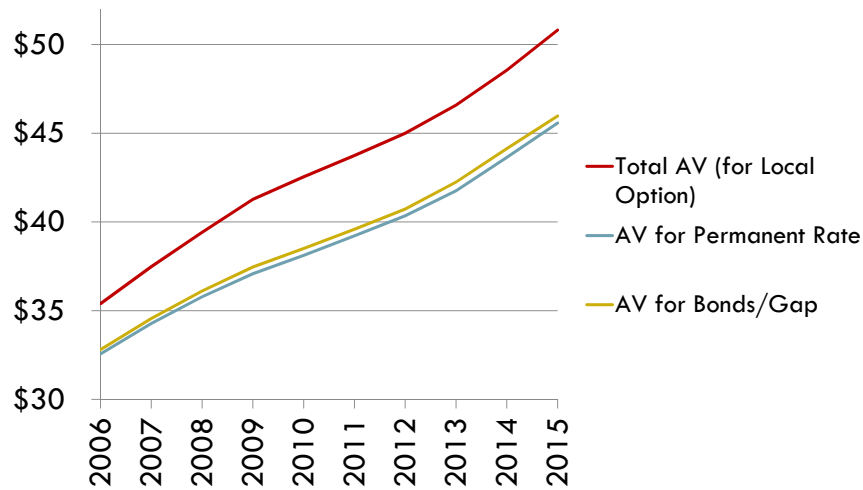
Urban Renewal

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- Some assessed value is identified to support urban renewal programs. Revenue is diverted to urban renewal districts.
- This reduces the amount of taxes collected by PPS.
- Local option is exempt from urban renewal diversion.
- Higher level of urban renewal exclusion for permanent rate (10.3%) than for gap rate and capital bond (9.5%).
- These figures are relatively consistent over time.

Assessed Value History (billions)

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Compression

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- Property tax limitation measures created limits based upon market value that can reduce amount of property tax imposed.
- Calculated on each individual property, not aggregate district or neighborhood.
- Applies first to local option (21.8% loss), only after that to permanent rates (0.94% loss).
- Does not apply to capital bonds.

Collection Rates

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- We are using the trailing five-year average:

Year	Collection Rate
2014/15	95.0%
2013/14	94.7%
2012/13	94.6%
2011/12	93.7%
2010/11	94.3%
Average	94.5%
2009/10	94.4%
2008/09	94.3%
2007/08	94.5%

Revised Estimates for 2015/16

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Permanent Rate:

- 2015/16 Adopted Budget: \$200.3 million
- Revised estimate: \$203.6 million
- Most of the variance is explained by the assessed value growth of 4.44% compared to our budget assumption of 3.0%
- This higher estimate is not all for the benefit of PPS because this revenue is included in the state school fund calculation and will be largely offset by a lower distribution from the state.

Revised Estimates for 2015/16

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Local Option:

- 2015/16 Adopted Budget: \$72.2 million
- Revised estimate: \$74.7 million
- Assessed value growth of 4.7% is higher than our budget assumption of 3.5%
- The net benefit of the local option renewal, which eliminated the diversion of funds to urban renewal, was greater than expected.
- Compression was reduced by 4 percentage points (to 21.8%), which was 1 percentage point less than forecast.
- PPS retains all of this revenue.

Revised Estimates for 2015/16

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Gap:

- 2015/16 Adopted Budget: \$21.5 million
- Revised estimate: \$21.7 million

Bond:

- 2015/16 Adopted Budget: 47.3 million
- Revised estimate: \$47.6 million
- In both cases the variance is explained by higher assessed value growth; and the revenue is retained for the benefit of PPS.

Next Steps

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- Staff will be incorporating these new figures in recommendations for Amendment #1 to the 2015/16 budget.
- The amendment will also include updates on beginning fund balances, as well as fall balancing revisions to teacher salary budgets and healthcare benefits.