



PORTLAND PUBLIC SCHOOLS
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To: School Board
From: Claire Hertz, Deputy Superintendent for Business and Operations
Subject: SE Enrollment and Program Balancing Phase 2 Recommendation

BACKGROUND

In February 2020, the PPS Board of Education and the Superintendent launched an enrollment and program balancing process through Resolution 6059 to address system issues related to the use of physical facilities that impact student success and further our ambitious goals to improve student outcomes through the implementation of academic strategies and social-emotional support for our students.

The first phase of the process focused on converting K-8 schools in the Southeast as part of re-opening Kellogg Middle School. The Southeast Guiding Coalition (SEGC) delivered recommendations in December 2020, and the Board adopted a plan for Kellogg Middle School in January 2021. Later that Spring, the Board approved Resolution 6315, charging the SEGC to recommend:

- Attendance area and special program assignments for Harrison Park Middle School
- A plan to relocate K-5 students and programs currently served at Harrison Park
- A plan to increase enrollment at Lane Middle School

The SEGC is a volunteer group of parents, community members, and school leaders who came together in May 2021 to achieve the Board's charge. Some were returning members from the Phase 1 process, and some were new volunteers for Phase 2. Their work was supported by FLO Analytics and BRIC Architecture, along with more than a dozen staff across multiple central office departments.

The Coalition met 19 times, all virtually, due to limitations for large group gatherings during a pandemic. The Coalition considered fifteen proposals, potentially impacting attendance zones, program locations, and middle school feeder patterns for twenty SE schools. They received input from hundreds of community members through surveys, written responses, school-organized discussions, and focus groups for Black, Native, and other traditionally marginalized stakeholders and students. The virtual environment limited the coalition's ability to collaborate on complex scenario-building and analysis and slowed the overall process. We

commend them for their dedication, resiliency, and commitment to racial equity and children.

The result of their work was a [recommendation](#) that received the most votes but not consensus support from the coalition. Many coalition members were concerned that middle school enrollment would not be well balanced. Additionally, a racial equity issue was called out because the process did not include our more affluent, less diverse, inner SE schools and put the burden of balancing enrollment on our outer SE schools with higher numbers of Black, Native, and students of color.

In the initial charge from the School Board, staff was asked to limit the number of schools and families impacted by the process in response to community concerns raised about making changes during a pandemic. Staff only included schools geographically proximate to Lane Middle School and the future Harrison Park Middle School, which were the focus of the SE Enrollment and Program Balancing charge.

While we acknowledge these concerns, we also see strengths in the plan, particularly for students of color and other historically marginalized groups:

- Harrison Park K-5 students will remain together, including their neighborhood Chinese Immersion program, and move to the closest possible building, maintaining walkability and school continuity, as requested by this diverse community.
- Harrison Park Middle School will welcome new students from Atkinson and Vestal neighborhoods and become the regional home for the Chinese immersion middle school program centered in the Jade District of Portland. Enrollment is expected to exceed the target, and further growth could occur due to increased interest in new CTE programs included in the renovations to the facility to be completed in Summer 2022 and 2023.
- Lane Middle School will add approximately 150 new students through boundary changes with nearby schools, which will improve resources for providing an array of elective and support programs for all students.
- Two of three K-5 Spanish Immersion programs in the region will combine to form a whole-school program at Lent, which will provide more opportunities for students to work with bi-lingual staff, greater opportunities for professional development, and educator collaboration, and more stable student cohorts. Lent neighborhood students will have guaranteed access to the program in the future, expanding bilingual learning in a historically underserved area of the district. Current Lent students who are not in Spanish Immersion will have the opportunity to go to Marysville, where they will be part of a 2-3 strand neighborhood program instead of a small single strand at Lent.
- Three of the smallest neighborhood schools which serve large populations of Black and Native students, Vestal, Woodmere, and Whitman, will see enrollment increases to help ensure greater program opportunities.
- Kellogg Middle School, which just opened this year, would also see changes from the proposal. The blocks closest to Kellogg would now be part of its attendance area, and the Spanish Immersion program at Mt. Tabor MS would relocate to Kellogg, consolidating all Spanish Immersion in the region at a single middle school. Kellogg will

become the largest middle school in the region, serving a student population with 30% direct certification, 6% Black and Native students, 12% English language learners, and 55% students of color.

These changes are recommended to begin in Fall 2023. To allow as much student stability as possible, boundary changes would start with incoming kindergartners at elementary schools and 6th graders at middle schools, allowing current students to remain until the highest grades of their current schools. However, changes for language immersion programs, Creative Science, and Harrison Park neighborhood students will occur all at once. An option to defer moves for Lent non-DLI students moving to Marysville will be considered after bringing together school communities to prepare for the changes and considering the available facility capacity at Lent.

RELATED POLICIES/BEST PRACTICES

4.10.045-P, Student Assignment to Neighborhood Schools

4.10.051-P, Student Enrollment and Transfers

ANALYSIS OF SITUATION

The PPS Board of Education initiated reconfiguration of neighborhood K-8 programs back to K-5 and middle school structures in 2016. Kellogg MS was rebuilt through a voter-funded bond effort and opened eight months ago, becoming the fourth middle school to reopen in five years. Harrison Park is the last neighborhood K-8 school in Southeast, but there are seven others in N, NE, and NW Portland that will be addressed in future phases of enrollment and program balancing.

In addition to reconfiguring K-8 schools, the Board directed additional outcomes when it launched district-wide enrollment and program balancing in 2019, including reducing the number of single-strand neighborhood and Dual Language Immersion (DLI) programs, strengthening enrollment at small elementary and middle schools to support robust programming, addressing split elementary-to-middle and middle-to-high school feeder patterns, reducing overcrowding, and limiting the use of modular classrooms where possible.

As the [SEGC 21-22 baseline data](#) shows, numerous Southeast schools experience enrollment challenges that impact their ability to offer a broad range of electives and support programs, while others have such large populations there is limited space for specialists to work with students and common areas are crowded. The [Racial Equity Impact Measures](#) (REIM) provide a visual overview of the current state and proposed changes for several key enrollment metrics, disaggregated for Black and Indigenous, English Learning, and Low-Income students. A summary of changes for each impacted school can be found [here](#).

Special Program Placements

Special program placements played an important role in SEGC Phase 2, particularly Spanish DLI, Chinese DLI, and the Creative Science School, which enroll collectively 1,555 students in grades K-8 across nine SE schools. Students enter primarily through the annual lottery, and most programs serve students from multiple neighborhoods and regions (current Harrison Park neighborhood-only Chinese DLI is an exception).

As part of the Board's charge, PPS staff were asked to provide guidance on preferred locations and configurations of dual language immersion programs, special education services, focus option programs, and pre-K services. PPS instructional leaders encouraged SEGC to consider proposals that consolidated K-5 Spanish and Chinese DLI programs into whole-DLI schools instead of co-locating with neighborhood or English-scholar programs. This was supported by [analysis](#) from our Research, Assessment, and Accountability office, showing that, within co-located schools, Direct Certification rates are consistently higher for neighborhood strands and lower for the DLI strands. This can lead to disparities in needs vs. resources when funding is allocated at a school level. Additionally, when controlling for Direct Certification rates, we consistently see lower performance on SBAC testing for students in the neighborhood strand at co-located programs than students in schools with co-located programs (except in our highest SES schools). Spanish and Chinese Limited English Proficient students in immersion programs perform higher on English & Language Arts SBAC tests than their peers in later grades.

While the whole-DLI proposals received some support, many communities and SEGC members raised concerns about segregating students of color to more distant schools and described the strengths of co-located programs. SEGC was open to considering co-location and whole-school DLI proposals for elementary schools. They established a shared goal of consolidating DLI middle school programs, so that all elementary feeder strands in the same language would come together on a single campus and that no campus would have more than one immersion program.

As a result, the SEGC recommendation consolidates two of three elementary Spanish DLI K-5 programs at Lent Elementary School, leaving one program co-located at Atkinson. The Mt. Tabor and Kellogg Middle School Spanish DLI programs will come together at Kellogg Middle School. Chinese DLI K-5 programs will remain co-located at Woodstock and Clark when it becomes the K-5 location for Harrison Park students. The Hosford and Harrison Park Middle School Chinese DLI programs will come together at Harrison Park MS. These program consolidations will result in more robust and efficient staffing and professional development, positively affecting instruction and student outcomes, particularly for native speakers of the DLI language.

The recommended DLI program placements received more SEGC votes than an alternative model. Some members were concerned that Kellogg Middle School enrollment would remain much larger than Harrison Park's. Students who live closer to Kellogg would have to travel further to attend neighborhood schools. Kellogg would be a more central location for Chinese DLI students. Given that the recommendation will result in significant relocations for Bridger Spanish DLI and Lent neighborhood students, it is also important to note that representatives from those communities support Spanish DLI and Lent neighborhood remaining at Kellogg Middle School.

The SEGC requested and received an extra month to meet and develop alternatives to address these concerns. Despite these efforts, the new proposals did not achieve greater support.

The Creative Science School (CSS) focus option moved from Bridger into the Clark building in 2007 when Clark consolidated with Binnsmead Middle School and became Harrison Park K-8. Early in Phase 2, the SEGC arrived at consensus to bring Harrison Park neighborhood K-5 students back to Clark, leading to several options for CSS to relocate to other schools in the

region. Potential moves to Woodstock or Arleta met with strong resistance, but the Bridger neighborhood community was open to rejoining CSS. Combining current CSS and Bridger neighborhood students in 2023 is expected to fill all available space at Bridger, including the modular classrooms. However, as lottery slots are reduced, the neighborhood-based focus option program will fit into the main Bridger building with minimal need for modular classrooms.

SEGC members tentatively explored converting CSS to a K-5 structure, which would match the current Bridger structure and boost enrollment at Harrison Park MS. District leaders advised that the focus option would remain in its current configuration, so a small K-8 option remains available in outer SE. As requested in the Board's Charge, Instructional leaders advised the need for a small middle school experience in the region, which is having success with a best practice co-teaching model with general and special education teachers. Bridger neighborhood students who do not want to join the K-8 constructivist program will have guaranteed placement at Clark K-5 and Harrison Park Middle School.

Feeder school and boundary line changes

The Harrison Park Middle School attendance area will expand to include two new feeder schools: Vestal, which is currently assigned to Roseway Heights Middle School, and Atkinson, which is currently assigned to Mt. Tabor Middle School, as well as the northeast corner of the Mt. Tabor attendance area. Because Harrison Park is on the eastern edge of the PPS district boundary, there were few feasible options for increasing the size of the neighborhood, especially with Bridger joining Creative Science K-8. Both Roseway Heights and Mt. Tabor enrollment could fall below 500 students when the boundary changes are fully implemented. However, both are adjacent to K-8 schools in NE and could see additional changes in the next phase of K-8 enrollment and program balancing.

Lane Middle School has the smallest number of resident students of all the middle schools in the region. After exploring numerous combinations of boundary changes, feeder pattern adjustments, and program moves, SEGC agreed to recommend adding the Woodstock neighborhood as a feeder school and increasing the Lane boundary to include portions of Sellwood and Kellogg. The boundary changes will also help increase enrollment at Whitman and Woodmere elementary schools. Additionally, Creston will shift from Kellogg and become a feeder school to Hosford. All boundary changes and feeder pattern shifts can be seen in the [school by school impact analysis](#) and through the [online address lookup](#).

SEGC members continually expressed frustration that schools just to the west were not included in Phase 2, which limited the range of boundary change possibilities. Many felt strongly that including more schools would have resulted in higher enrollment at small elementary schools and safer walk routes across numerous schools. They were also concerned that high school assignments were not addressed in the Phase 2 process.

Transition Planning for Success

The Guiding Coalition also expressed support for steps to ensure a smooth transition to the new configurations, including allowing boundary changes to be phased in over time, increased transportation to new program locations, supplemental staffing to ensure Harrison Park and small elementary schools can build programs while enrollment grows over time, and ensuring that partner programs remain available to support Black, Indigenous, and students of color.

Their suggestions helped inform the request for resources and implementation plans described below.

FISCAL IMPACT

Balancing enrollment in SE schools could improve the efficiency of staffing allocations over time as some schools will earn more resources through increased student populations. The impact of the pandemic has lowered enrollment throughout the district, especially in the early elementary grade levels, and has not allowed for as much elementary school balancing in the SE region.

Transportation routing is being analyzed for the latest proposal and will not be complete until spring 2023 due to the implementation timeline of Phase 2. The Transportation Department is evaluating the criteria for an updated Transportation Supplemental Plan for the District, including the changes in the SE region. Staff will submit the Supplemental Plan for the Board's approval after the final proposal is approved. It is recommended by Deputy Superintendent Hertz that no PreK-8 students in the SE region would cross Interstate 205, and bus transportation would be provided to students living in these areas. An estimated two additional routes are needed for elementary and middle students due to boundary changes and new distances to school. Many of the program moves that would require transportation for underserved students already have bus routing in place and will mean a change in routing rather than new routing.

Harrison Park Middle School [facility upgrades](#) are funded through the 2020 bond program. Some changes are specific to the middle school curriculum and students, including additional science classrooms, a dance studio, and additional counseling and STEAM spaces. There will be upgrades to the front lobby area with new finishes and lighting, front entrance with landscaping, and hardscape changes. Restroom improvements will update to be ADA compliant, replace fixtures, and finishes, and convert certain restrooms to be single-user, gender-neutral. Security upgrades will include adding security cameras in corridors and other select locations, and the mechanical systems will be improved. New lockers will be installed schoolwide, an outdoor play structure constructed, and athletic improvements will include updating the main and auxiliary gyms, locker rooms, and the athletics lobby.

To facilitate the boundary and program changes over the next five years, Deputy Superintendent Hertz recommends a staffing pool of 10 licensed FTE to be equitably allocated each year to help build programs at Harrison Park and SE schools through the transition.

Additionally, to support families willing to transition to their new schools early, requests for transfer into the new boundary or program locations will receive priority for the 2022-23 school year.

COMMUNITY ENGAGEMENT

A summary of [Community Engagement](#) input throughout Phase 2 included:

Initial Feedback: July-August 2021 One-on-one executive conversations with 335 parents/guardians who have current or soon to be middle school-aged children in and reside within the southeast portion of the Portland Public School District helped provide us with initial insight.

Ideas and Input: September-October 2021 To promote authentic engagement, a race-based affinity model supported hearing open thoughts and experiences from students and families in the Southeast impacted by the Phase 2 process throughout September 2021. Recognizing the impact of potential outcomes, we encouraged families from Lane, Creative Science, Harrison Park, Woodstock, and beyond to participate before early decision-making in the process.

Action and Accountability: December 2021 Specific and targeted spaces that continue the race-based affinity model were made available for direct input on proposed scenarios, including Black, Indigenous & Students of Color, Spanish-Language, Mandarin-Language, Black, Indigenous, & People of Color, PAT, Russian-Language, Somali-Language, Vietnamese-Language, Cantonese-Language sessions. A virtual open house on December 8 was attended by 470 community members. The primary concern shared at that event was the absence of inner Southeast schools from the Phase 2 process.

Action and Accountability: Winter 2021 the Coalition asked to hear more from Lent and other diverse communities who could see significant changes through the proposal. Direct outreach to families of color happened through phone, email and text, and students and staff from Lent and Kellogg Spanish Immersion wrote letters to the Coalition. Themes included strong support for Spanish Immersion remaining at Kellogg and concern about distance and accessibility if programs moved to new locations.

Additional written comments continued to be submitted by stakeholders across the Phase 2 region. All letters and email messages can be viewed [here](#).

Feedback on Draft Proposal: April 2022 Our Research, Assessment, and Accountability Team created an electronic survey and summarized community feedback in a [SE Proposal Survey Report](#) on April 26. The survey remains open and will be summarized a second time on May 13th and published to the Board and Community by May 20th.

Input on the recommendation continues to be sought from individual school communities experiencing the most impact from the proposal.

On April 27, staff met with about 25 parents and teachers at Lent Elementary School to hear their ideas and concerns about the proposed change to a whole-Spanish DLI school. While there is support for the immersion program growing, the Lent community asked that their community not be divided and the school be allowed to remain a co-located English and Spanish Language Immersion program. A second request was to allow current English program students to have the opportunity to remain at Lent instead of having to relocate to Marysville. They also expressed frustration and equity concerns that the Atkinson single-strand Spanish Immersion program, which serves fewer low-income students, is not having to convert to the whole-school DLI transition at this time.

A virtual/in-person meeting on April 28 was attended by about 70 Bridger Elementary School parents and teachers. Bridger families shared the frustration noted by the Lent community about Atkinson Spanish DLI remaining as-is and concerns about the distance to Lent. They also asked questions about proposed boundary changes and how the transition with CSS would work, and they presented ideas for strengthening the neighborhood program during the 2022-23 school year.

An Open House for the greater SE community will be held May 5th from 6-8 pm in the Franklin HS cafeteria. A summary of feedback from that event will be provided to the Board before May 10th.

TIMELINE FOR IMPLEMENTATION / EVALUATION

Due to the lengthy process and staffing complexities, implementation of changes will begin in fall 2023. Staff recommends that boundary and feeder pattern changes follow the phase-in process described in policy 4.10.045-P. Program relocations should occur all at once, so that staff and resources associated with the programs can be consolidated and strengthened as quickly as possible. This includes Harrison Park K-5 students moving to Clark, Creative Science K-8 students moving to Bridger, Bridger Spanish DLI students moving to Lent, Mt. Tabor Spanish DLI students moving to Kellogg, and Hosford Chinese DLI students moving to Harrison Park. An option to defer moves for Lent non-DLI students moving to Marysville will be considered after bringing together school communities to prepare for the changes and considering the available facility capacity at Lent.

Implementation impacts by school, program, and year can be found [here](#).

To prepare for the changes, school leaders will begin informally bringing together communities as soon as Fall 2022. Families who apply for transfer to their new schools will receive priority for the coming school year. Central departments, including transportation, early education, dual language immersion, special education, human resources, facilities, school modernizations, enrollment and transfer, middle school redesign, and community partnerships, will support school leaders in assuring a smooth transition in fall 2023. In particular, Harrison Park Middle School will receive facility upgrades. Harrison Park and Lane will be pilot schools for the Middle School Redesign initiation. Lent is slated to add a Spanish DLI Pre-Kindergarten program in fall 2022. Additionally, transportation routes will be added to support Chinese DLI students assigned to Harrison Park, Spanish DLI students assigned to Lent, and non-DLI students from the Lent neighborhood assigned to Marysville.

Evaluation of middle school success will be part of the Middle School Redesign. DLI and focus option program evaluations may be conducted in the future.

BOARD OPTIONS WITH ANALYSIS

The Board has the option to accelerate boundary changes by assigning additional grade levels to the new schools in the first years of the change. Accelerating boundary changes would help increase enrollment at small schools like Whitman and Lane. However, given the disruptions and socio-emotional impact of the pandemic over the past three school years, staff supports the

standard, a slower rate of implementation so as many students as possible can avoid additional school transitions.

PPS instructional leaders recommend that program changes be implemented all at once to create cohesive staff and student communities as quickly as possible and avoid the ongoing instability of having to add or reduce staff across multiple school years. The board can direct a phase-in approach, which could be preferred by current 6th graders in Hosford Chinese DLI and Mt. Tabor Spanish DLI who would be able to finish at their current middle schools.

Additionally, the Board has the option to designate a specific plan to phase out the Lent English program. Deputy Superintendent Hertz recommends that the pace of transition be determined by school leaders after bringing together school communities to prepare for the changes and considering the available facility capacity at Lent.

CONNECTION TO BOARD GOALS

The Board’s charge for the SE Enrollment and Program Balancing process is to support equitable access to programs and services and to improve the middle school experience, particularly at Harrison Park and Lane middle schools. The charge for the SE process includes a focus on sufficient enrollment to offer full programming for some of our most vulnerable students. The intent is to create robust and stable enrollment to support the implementation of academic strategies and create conditions in our physical spaces that enable student success.

STAFF RECOMMENDATION

Deputy Superintendent Hertz recommends accepting the SEGC recommendation for enrollment and program balancing proposal F-3 amended with modifications below:

| Original SEGC Recommendation: | Deputy Superintendent Recommendation: |
|---|--|
| <p>Create a board mandate that would ensure equitable staffing and programming for all middle schools not meeting enrollment targets. Due to the unpredictability of the phase-in process, opt outs, and the legacy policy some middle schools are at risk of falling below 500 students (the district’s minimum enrollment target), especially in the initial years of implementation. For example, the Board could add funding equivalent to 1 FTE to every school with enrollment under the district’s minimum target (both K-5 and MS).</p> | <p>To facilitate the boundary and program changes over the next five years, Deputy Superintendent Hertz recommends a staffing pool of 10 licensed FTE to be equitably allocated each year to help build programs at Harrison Park and SE schools through the transition.</p> |
| <p>Require PPS to complete the planned Harrison Park facilities improvements before opening in 2023.</p> | <p>The Office of School Modernization and Facilities staff will oversee the identified Facility Upgrades to be constructed beginning</p> |

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| | <p>in Summer 2022, continuing in Summer 2023 for the Fall 2023 opening of Harrison Park Middle School.</p> |
| <p>To the greatest degree possible, maintain the current legacy policy for boundary changes to ease the burden on students and families.</p> | <p>Follow Policy 4.10.045-P:</p> <ol style="list-style-type: none"> 1. Students living in the neighborhood approved for a boundary change may remain at their current school through the highest grade. 2. Younger siblings living in a neighborhood approved for a boundary change have a guarantee through the transfer process to attend the former neighborhood school if an older brother or sister currently attends and will be attending the former neighborhood school the following school year. 3. Transfer students attending a school subject to a boundary change may remain at their current school through the highest grade. |
| <p>Prior to finalizing boundary changes, consider targeted changes that include some Inner Southeast schools to balance enrollment more effectively. For example, allowing adjustments to Grout, Abernethy, Llewellyn, and Duniway ES could ease their overcrowding and provide healthier enrollments at Creston, Atkinson, Woodstock neighborhood, Whitman, and Woodmere.</p> | <p>No changes will be made to schools not included in the SE Guiding Coalition process.</p> |
| <p>In keeping with the goals of centering BIPOC students, PPS should be required to create and implement transportation plans designed to help students attending in their current neighborhood to continue to access the programs in their new locations.</p> | <p>Transportation will be provided to families over 1 mile from an elementary school and over 1.5 miles from a middle school.</p> <p>Transportation leaders will submit to the Board a supplemental transportation plan to address safety concerns within the SE region to be implemented in Fall 2023.</p> <p>No students in the SE region will cross Interstate 205, and bus transportation will be provided to students living in these areas.</p> |

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| | <p>Provide transportation for the Harrison Park Middle School Chinese Immersion program to support students from the Woodstock DLI program.</p> <p>Continue to provide transportation to neighboring communities for Lent Spanish DLI, adding students residing in the Bridger attendance area.</p> |
| <p>PPS should work with the Spanish DLI communities from Bridger and Lent to clarify how the transition of Lent to a whole-school Spanish DLI school will be phased in, address transportation and other necessary supports and to build community among the programs that will be merging. Clear, strong and well-planned resources should be provided to neighborhood students who will be leaving Lent ES to neighboring schools.</p> | <p>Program relocations should occur all at once, so that staff and resources associated with the programs can be consolidated and strengthened as quickly as possible. This includes Harrison Park K-5 students moving to Clark, Creative Science K-8 students moving to Bridger, Bridger Spanish DLI students moving to Lent, Mt. Tabor Spanish DLI students moving to Kellogg, and Hosford Chinese DLI students moving to Harrison Park. An option to defer moves for Lent non-DLI students moving to Marysville will be considered after bringing together school communities to prepare for the changes and considering the available facility capacity at Lent.</p> |

As a member of the PPS Executive Leadership Team, I have reviewed this staff report.

___CH___ (Initials)

ATTACHMENTS

- A. [SEGC 21-22 baseline data](#)
- B. [Racial Equity Impact Measures](#)
- C. [Analysis of Co-Located Chinese and Spanish DLI Programs](#)
- D. [Harrison Park Facility Upgrades](#)
- E. [Community Engagement Summary](#)
- F. [School-by-School Impact Analysis](#)
- G. Proposal Map series: [Overview map](#), [Elementary boundary changes](#), [Middle school boundary changes](#)
- H. [SEGC Phase 2 Final Report](#)
- I. [SEGC Supplement \(Inner SE School Exclusion\)](#)
- J. [Racial Equity Impact Analysis 4/5/22](#)
- K. [SE Proposal Survey Report](#)

- L. [Online address lookup](#)
- M. [SE Final Proposal Enrollment Chart](#)
- N. [SE Final Proposal Assignment Graphic](#)