



Administrative Directive 4.10.054-AD

Student Transfers

I) Introduction

Student transfers are accessible to all resident students in district schools and programs through a fair, equitable and consistent process. The district is committed to furthering student achievement, culturally relevant practices, and diversity in admissions that support the Racial Educational Equity Policy (2.10.010-P). The process includes a lottery cycle for transferring into focus option, dual language and alternative schools and programs, an Open Enrollment cycle for entry to lottery-based schools after the lottery closes and a year-round petition request for transferring into neighborhood schools. This directive also includes transfers initiated by the district when necessary for students to access appropriate services. The District will provide families and students with information that will enable them to make informed decisions about their choice of educational options. This directive does not apply to nonresident students, alternative education placements made outside of the lottery process, pre-kindergarten admissions, or charter school admissions. All procedural guidelines for this administrative directive are available online and at the district's Enrollment and Transfer Center (ETC).

II) Definitions

(1) School and program terms

- (a) Neighborhood school. A school serving a designated attendance area and as defined in 6.10.022-P.
- (b) Transfer school. The school to which a student has transferred.
- (c) Enrolled school. The school a student is currently attending.
- (d) Focus option. A school or program of a school structured around a unique curriculum or particular theme and as defined in 6.10.022-P.
- (e) Lottery-based schools and programs. Themed focus option, dual language immersion and alternative schools and programs open for admission through the annual lottery cycle and through open enrollment after the lottery cycle closes.
- (f) Continuing program. A program that continues from one school grade grouping to the next, often in different school buildings. For example a K-12 language immersion program begins in an elementary school for the K-5 grades, and then continues to a middle school in a different building for the 6-8 grades. Students in continuing programs are pre-approved to continue to the next grade grouping.
- (g) Open Enrollment program. The admission process for lottery-based schools and programs that remains open after the lottery transfer cycle closes.



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(h) School grade grouping. Refers to different school levels: elementary, middle and high school. Elementary schools may begin at PK or K and end at 5th grade or 8th grade. Middle schools contain grades 6-8, and high schools are grades 9-12.

(i) Direct Certification. A process conducted by states and by local educational agencies to certify eligible children for free meals without the need for household applications.

(2) Student and family terms.

(a) Siblings. Children with the same parent or supervising adult living together at the same address.

(b) Co-enrolled siblings. Siblings who will be enrolled in the same school at the same time. For students applying to focus option programs at schools with multiple programs, co-enrolled sibling status will be assigned at the program, not school, level.

(c) Linked siblings. Siblings applying for transfer to the same school and same grade for the same school year. Such siblings may be linked so that families have the same outcome for their children who are requesting a transfer.

(d) Supervising adult. An adult in a parental relationship as defined in 4.10.047-AD. Supervisory adult status is confirmed by the ETC.

(e) Articulating students. Students transitioning from one school grade grouping to the next. For example, fifth graders in elementary school preparing for sixth grade in middle school; eighth graders in middle school preparing for ninth grade in high school.

(f) Transfer student. A district student attending a school other than his/her neighborhood school.

(g) Resident student. A student who is a resident of the Portland Public School District.

(h) Non-binary. A term that refers to people who identify outside of or beyond the gender binary of man and woman.

(3) Admission and transfer terms.

(a) Transfer. A formal request by a resident family for a student to attend a school or program other than the neighborhood school or to return to the neighborhood school from a transfer school. Lottery transfer requests must be submitted by the annual transfer deadline to be considered. Following the lottery,



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new transfer requests into lottery-based schools and programs are made through the open enrollment application. Petition transfer requests to neighborhood schools may be submitted at any time. Transfers are approved to the highest grade of the approved school or continuing program.

(b) Lottery transfer cycle. The period of time in which families may submit a lottery application for the following school year.

(c) Lottery. A centralized computer software-based system that determines student assignment and generates wait lists. The lottery process includes admission preferences and equity and diversity factors aimed at eliminating barriers to educational attainment and improving student achievement, as provided in Policy 4.10.051-PStudent Enrollment and Transfers.

(d) Hardship Petition transfer. A request to transfer to a neighborhood school based on verified extraordinary circumstances.

(e) Extraordinary circumstances. The basis for granting or denying petition transfers, including urgent family situations or situations that pose imminent health, safety or serious educational concerns for the student. A list of frequent reasons for petition transfer requests is available on the ETC website.

(f) Weighted factors. Factors included in admission to lottery-based schools to ensure their enrollment reflects the diversity of the district. Changes to weighted factors require school board approval.

III) Student Transfer Admissions

(1) All resident families have the right to request a student transfer to a school or program other than their own designated neighborhood school.

(a) Students on transfer wishing to return to their neighborhood school must submit a petition transfer request. Requests received before the start of the school year will be granted. Requests received during the school year require a verified reason for approval.

(2) Length of transfer. Transfer students may remain in a school or program to the highest grade of the school or program. Upon completion of the highest grade of the school or program, students are enrolled in their neighborhood feeder pattern school unless they apply for and are granted a transfer to a different school or program.

(a) Exception: Students enrolled in a program that continues from elementary to middle school and/or middle school to high school are pre-approved to continue without submission of a new transfer application.



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(3) Alternative Education Options. If a transfer student leaves a school to enroll in an alternative school, they may return to the transfer school during the same school year. This applies to an expelled student who was placed in an alternative program for the period of expulsion.

(4) Break in Attendance. If a student stops attending a school or is dropped for non-attendance after ten consecutive days (OAR 581-023-0006(4)(b)) during the school year without enrolling in another school or program, the student may return to the transfer school during that school year. However, if the student does not return to the transfer school during that school year, the transfer is no longer valid for the subsequent years and the student must return to the neighborhood school or request a new transfer. If the student completes a school year but does not return during the first ten days of the subsequent school year, the transfer is no longer valid and the student must return to the neighborhood school or request a petition transfer.

(5) District-Initiated Transfers

(a) Special education. In order to meet the educational needs of students with disabilities, those students may be assigned to specialized program services outside of their neighborhood school.

(i) Students with disabilities who receive services outside of their neighborhood school due to a district-initiated transfer and no longer need those services will be allowed to remain at the transfer school through the highest grade.

(b) Students in special education and students eligible under Section 504 of the Rehabilitation Act of 1973 may request a transfer to another school in the District. In order to be approved, the requested transfer must meet both of the following criteria:

(i) The requested transfer must meet District guidelines for student transfers including the lottery process, as described in this administrative directive; and

(ii) The requested transfer must not deny the student a free appropriate public education (FAPE).

(c) Placement by Multilingual Department. Students who qualify for English Language Development (ELD) services may be placed in schools outside of their neighborhood attendance areas.



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(i) Students requiring ELD services may be offered placement in a school other than their neighborhood school by the Multilingual Department, based on student's needs and service availability at the neighborhood school.

(ii) Students no longer requiring language services outside of their neighborhood school will be allowed to remain at the transfer school through the highest grade.

IV) Lottery Operations

(1) Lottery Application. The ETC shall develop a lottery application for admission to lottery-based schools and programs that will be widely available to schools and families.

(a) The Focus Option Lottery Application shall include space for families to provide the following:

(i) Student and family information

(ii) Sibling information

(iii) Up to three school or program choices

(b) All students requesting a transfer to a lottery-based school or program are required to submit a lottery application by the deadline to be considered in the lottery. The deadline shall be posted on the district's web site and widely publicized in other district communications.

(c) Students enrolled in continuing programs such as language immersion programs who wish to continue to the next school grade grouping (middle or high school) of the program are not required to submit a lottery application.

(2) Admission requirements for lottery-based schools and programs. Lottery-based schools and programs may have admission requirements so long as the requirements are the same for all applicants.

(a) Requirements may include attendance at informational meetings, completion of statements of understandings or student essays and/or submission of school registration packets within a set timeframe after lottery results have been announced. Alternative programs may have additional requirements.

(b) Students applying for entry to 11th or 12th grades at lottery-based schools and programs may be subject to a transcript review to ensure they will be able to complete graduation requirements at the requested school.

(c) Students applying to grades 1-12 in Dual Language Immersion programs may be subject to a language assessment in the target language to ensure they will be able to successfully join the program.



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- (d) Information about admission requirements will be available at schools and on the district website. Any lottery-based school or program with admission requirements must provide multiple opportunities for families to complete the requirements.
 - (e) Students and families who do not meet requirements may forfeit approval to their requested school or program.
- (3) When transfer requests exceed available spaces, the centralized lottery determines student assignment and generates wait lists. The ETC conducts all lotteries and notifies families of the results.
- (4) Lottery Information. A detailed description of all lottery preferences and weights will be available on the district's website during the transfer cycle.
- (5) Preferences. The lottery allows for preferences in the following order:
- (a) Students continuing from their previous school grade grouping if required by the focus option plan of operations.
 - (b) Students required by state or federal law or other District policy to receive priority.
 - (c) A student whose sibling will be enrolled at the same time in the student's first choice lottery-based school or program.
 - (d) Students who meet federal guidelines to receive free and reduced-price meals or attend a Head Start Pre-kindergarten program, in a proportion corresponding to a district-wide average. The preference will occur at lottery-based schools and programs where the rate of enrolled students in the school who qualify for free and reduced-price meals through direct certification is lower than the district-wide average.
 - (e) Resident students who have submitted an on-time lottery transfer request.
- (6) Weighted factors. A weighted factor for gender is included in the lottery. Gender balance is measured by a school's current percentage of boys and girls with the District's overall percentage. Students who improve the gender balance at their school and non-binary students are weighted in the lottery.
- (7) Linked siblings. Siblings applying for transfer to the same school and same grade for the same school year may be linked so that families have the same outcome for their children who are requesting a transfer.
- (8) Language Immersion Program Openings. A proportion of available spaces may be allocated for native language speakers and/or for students living in the neighborhood of either the school in which the program is located or the regional high school serving the program.



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(9) Notification of lottery results. The ETC will send families the results of the lottery. Families must then contact the approved transfer school for enrollment information.

(a) Parents may withdraw their transfer request by contacting the ETC within ten calendar days of receiving their notice. After withdrawing a transfer request, students are assigned to their currently enrolled school or neighborhood school if the student is articulating to the next grade grouping.

(10) Following the lottery cycle, lottery-based schools and programs with unfilled spaces will be open for transfer through the Open Enrollment application. Open Enrollment applicants to lottery-based schools and programs without available spaces will be added to the waitlists based on the lottery preferences and weights.

VI) Wait List Management for Student Transfer Requests

(1) The centralized lottery generates the wait list for each lottery-based school and program that has more applicants than spaces. The wait list is based on the same weighted factors and preferences as the lottery. Following the lottery, Open Enrollment applicants may be placed on wait lists if there is currently no grade-appropriate space available at the requested school. An additional weight may be added for Open Enrollment applicants who present verified extenuating circumstances.

(2) Waitlists may also be in effect at neighborhood schools when there is no grade level space available for petition applicants who have presented valid transfer reasons.

(3) The ETC manages and maintains all wait lists for neighborhood and lottery-based schools and programs.

(a) Wait lists remain active until the last day of September.

(i) Students are expected to attend their assigned school while remaining on a wait list.

(ii) Students may keep an approved choice and stay on the wait list of a higher choice until the wait list expires.

(iii) Should an opening become available beyond the last day of September, school and program administrators will be consulted to determine whether the space should be filled at that time or held for the following transfer cycle. If the space is to be filled at the time, families will be contacted in the order last provided by the expired wait list.

(4) Immersion programs may prioritize applicants who are English-Language Learners when filling openings that occur during the school year.



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VII) Petition Transfers

A petition transfer is a request to transfer to a neighborhood school based on extraordinary circumstances.

(1) Process for Filing a Petition Transfer

- (a) Before a Petition Transfer Form is filed by the family, the family and school staff should discuss ways to resolve the concerns and help the student and the family recommit to the enrolled school.
- (b) When a family requests a transfer for health reasons, safety reasons or an urgent family situation the ETC will expedite the process.
- (c) Students and their families initiate a petition transfer.
- (d) Petition Transfer Forms are available on-line, and accessible in schools and the ETC.
- (e) The ETC will make available information to assist families in completing petition transfer requests, including a list of frequent reasons for transfer.
- (f) ETC staff may seek input from the principal and/or other staff at the student's assigned school before deciding whether a family has presented a valid reason for transfer.
- (g) Reassignment. Reassignment determines the school to which a student is assigned after being granted a petition transfer. Families may list up to three schools and why they consider them appropriate; however, there is no guarantee that the student will be reassigned to any of the listed schools. If the family has presented a valid transfer reason but there is currently no grade-appropriate space available at any of the requested schools, the student may be added to a waitlist.

(2) Petition Transfer Notification

- (a) Students remain in their enrolled school until a decision is made by the ETC to grant or deny the petition transfer request.
- (b) If the family's petition transfer is granted, the ETC shall first facilitate communication among the principal of the enrolled school and potential receiving principals. The family will receive a letter with reassignment information. The school designated for reassignment by the ETC is final. If the family refuses the assigned school, the student is expected to return to the enrolled school.
- (c) If the family's petition transfer is denied, the ETC notifies the family with a letter that explains the reason for the denial. The student remains in the enrolled school unless an appeal is filed and granted.



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VIII) Appeals Process

(1) A family may appeal the ETC's decision to deny a petition transfer or a lottery waitlist ranking by submitting a letter explaining the reason for the appeal and any additional information or documentation. An appeal may be granted on two grounds:

- (a) Failure of a school or ETC to follow established transfer procedures, or
- (b) New substantial information related to an extenuating circumstance.

(2) The ETC shall forward to the Assistant Superintendent (or designee) for the requested school all documents related to the petition transfer, including the reason for the denial, and documentation of extraordinary circumstances.

(3) The Assistant Superintendent or designee for the requested school shall review the ETC decision. The Assistant Superintendent or designee's decision is final.

- (a) The appeals process shall be completed within ten working days from the time the appeal is received at the ETC. The Assistant Superintendent or designee sends the written decision to the family.

Policy reference: 4.10.051-P

History: This AD number formerly was assigned to Boundary Changes, which is now 4.10.049-AD. Amd 7/2004, Amd 10/2006, Amd 4/2007; Amd 3/2009; Amd 2/2015; Amd 7/2018; Amd 11/2023