

Finance, Audit and Operations Committee  
October 24, 2017  
3:00 to 5:00  
Mazama Conference Room  
Agenda

1. Overview of Budget Timeline
2. Outside Legal Representation
3. Peach Jar Update
4. Public Comments

**January 2018**  
**General Timeline of Important FY 18-19 Budget Events**  
**As of October 17, 2017**

September

- Fall school staff balancing by Office of Schools.
- Citizen Budget Review Committee (CBRC) begins meeting.

October

- District Staffing Team begins meeting.
- Budget Development Process (District Staffing Team).
- Property Tax Revenues reported by Multnomah County.
- Official Student Enrollment Count for the State Report.

November

- FAO Decision on Staffing Model for K-5 and Middle School.
- Board Decision on Staffing Model and Middle School implementation.
- Superintendent presents staffing plan to Board.
- Board of Education confirms budget priorities.
- Superintendent presents school staffing to Principals.
- Initial revenue and expenditure forecast.

December

- Staffing Allocation loaded and completed by mid-December.
- Board approves prior year financial statements.
- Average Daily Membership for first semester completed.

January

- Present preliminary FY 18-19 budget to Superintendent for vetting and final decisions.

February

- Superintendent presents proposed budget to the Board.
- Public hearing(s) on proposed Budget (Board as Budget Committee – State Law requires at least one).

March

- CBRC Report to Board (Board as Budget Committee).
- Public hearing(s) on proposed Budget (Board as Budget Committee – State Law requires at least one).
- Budget approved (Board as Budget Committee).

April

- Tax Supervising & Conservation Commission (TSCC) Hearing.
- Budget adopted.

Disclaimer: In the past, when we posted PAT vacancy late in the fiscal year, we lost the opportunities to hire the most qualified candidates. Our hiring goal is to complete the external PAT vacancy posting in late January 2018. We understand our goal is very aggressive and each of the deliverables are inter-dependent.



# Board of Education Informational Report

## **MEMORANDUM**

**Date:** October 18, 2017  
**To:** Members of the Board of Education  
**From:** James Harris, General Counsel  
**Subject:** Proposed Miller Nash Contract Amendment

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This Memorandum provides background on Board Policy with regard to contracts for legal services. All contracts for \$150,000 or more and all amendments which increase the total contract value to \$150,000 or more require Board approval prior to contract execution.

The General Counsel may authorize contracts up to \$150,000 which are then negotiated and drafted by the Purchasing and Contracting Department.

Since I started June 15, 2017, I have authorized contracts with the following:

Lighthouse - not expected to exceed \$10,000 over a three (3) year period;  
Fisher/Phillips - \$10,000 and \$25,000  
Stoel Rives - \$10,000 and \$65,000

The remainder of the contracts were in place prior to June 15, 2017 and the Legal Department has worked under the terms of those contracts.

With regard to the Miller Nash Contract Amendment, the majority of the expenses are projected for one (1) type of case – Human Resources. We currently have eleven (11) active cases. As projected in the Weekly Board Report, these types of cases have projected costs in the range of approximately \$170,000 to trial to \$400,000 plus to trial (with an estimated average cost of \$310,000). The costs are largely determined by the number of depositions in each case.

The Proposed Miller Nash Contract Amendment has a cap of \$4 million. For the most part, it is based upon the current expenditure rate and the projected litigation that has already been noticed. The Legal Department is aggressively challenging the existing cases with the goal of significantly lowering actual expenditures over the next two (2) years.

Two (2) other items that are expensive include:

1. Union bargaining (\$39,956 in August);
2. Riverdale School District arbitration.

Other items to consider:

1. Monthly billing: First, Miller Nash confirmed that 2016/17 is the highest they have ever billed PPS. By way of example, the August billing is for \$171,678.50.
2. Case billing: The August bill has four (4) cases billed over \$27,000. Five (5) of the top seven (7) items are human resource cases
3. Risk management: From this perspective, we have 29 or 30 cases that are noticed and are or maybe in state or federal court.

### Outside Legal Expenses - July 1, 2012 through September 25, 2017

	FY 2012-13	FY 2013-14	FY 2014-15	FY 2015-16	FY 2016-17	FY 2017-18
<b>Budget</b>	\$ 550,004.00	\$ 550,004.00	\$ 382,720.00	\$ 382,720.00	\$ 382,720.00	\$ 963,470.00
<b>Actual</b>	550,390.69	1,187,559.04	1,049,331.37	1,365,553.03	1,732,867.20	165,778.88
<b>(Over Budget)/Under Budget</b>	<b>\$ (386.69)</b>	<b>\$ (637,555.04)</b>	<b>\$ (666,611.37)</b>	<b>\$ (982,833.03)</b>	<b>\$ (1,350,147.20)</b>	<b>\$ 797,691.12</b>

Vendor / Supplier Payment Detail	FY 2012-13	FY 2013-14	FY 2014-15	FY 2015-16	FY 2016-17	FY 2017-18
Barran Liebman, LLP	0.00	0.00	0.00	14,274.00	2,288.00	0.00
Bullard Law	0.00	8,795.50	1,404.80	813.70	1,901.30	0.00
David W. Stiteler	0.00	0.00	5,676.50	0.00	0.00	0.00
Don Dickey Mediation	0.00	0.00	0.00	4,167.50	0.00	0.00
Durham Jones & Pinegar, PC	0.00	0.00	2,021.02	0.00	0.00	0.00
Eric B. Lindauer	0.00	0.00	4,700.00	0.00	0.00	0.00
Fisher & Phillips, LLC	0.00	0.00	0.00	0.00	5,613.50	0.00
Garret, Hemann & Robertson, PC	273.00	0.00	0.00	0.00	0.00	1,275.00
Garvey, Schubert & Barer	3,693.34	4,015.36	2,663.85	4,048.48	2,886.30	400.00
Graham Hicks, PC	8,998.00	31,869.20	0.00	37,411.61	10,935.00	45.00
Harrang, Long, Gary & Rudnick PC	0.00	0.00	4,902.00	2,352.55	0.00	0.00
Hawkins, Delafield & Wood, LLP	0.00	0.00	0.00	0.00	2,665.72	0.00
Holland & Knight, LLP	0.00	0.00	0.00	0.00	5,232.50	6,994.50
Hollander Lebenbaum & Gannicott	9,459.16	0.00	0.00	0.00	0.00	0.00
Hungerford Law Firm	22,366.67	1,406.25	0.00	0.00	0.00	0.00
Jeanne Windham	0.00	9,660.00	0.00	0.00	0.00	0.00
Jill Goldsmith, Atty. / Workplace Solutions NW	0.00	0.00	4,437.77	11,690.07	7,636.00	0.00
Jim Carlisle	0.00	0.00	0.00	0.00	5,225.00	0.00
Joseph Duffy	0.00	0.00	0.00	5,343.20	0.00	0.00
Kantor Taylor Nelson Evatt & Decina, PC	0.00	0.00	10,000.00	0.00	0.00	0.00
Katrina I. Boedecker	5,813.63	0.00	0.00	0.00	0.00	0.00
Law Office of Sue Del McCulloch	0.00	0.00	0.00	4,700.00	0.00	0.00
Lemoine Legal Services	0.00	0.00	0.00	0.00	5,000.00	0.00
Lighthouse Services, Inc	0.00	0.00	0.00	0.00	0.00	3,625.00
Luella Nelson	0.00	0.00	0.00	0.00	5,400.00	0.00
Maisano Mediation, LLC	9,891.00	3,754.50	0.00	0.00	0.00	0.00
Michael Tom, Atty.	0.00	0.00	0.00	0.00	10,427.50	2,555.00
Miller, Nash, Graham & Dunn, LLP	469,301.82	1,101,120.52	938,287.64	1,203,138.11	1,549,167.86	141,354.88

### Outside Legal Expenses - July 1, 2012 through September 25, 2017

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Vendor / Supplier Payment Detail	FY 2012-13	FY 2013-14	FY 2014-15	FY 2015-16	FY 2016-17	FY 2017-18
Morton Silverman	11,250.00	0.00	0.00	0.00	0.00	0.00
Northwest Resolutions	0.00	2,625.00	0.00	0.00	0.00	0.00
Robert Phillips	950.00	0.00	0.00	0.00	0.00	0.00
Ogletree, Deakins, Nash, Smoak & Stewart, PC	0.00	0.00	0.00	1,343.00	6,859.50	2,883.50
Oregon School Boards Association	0.00	1,263.60	0.00	0.00	0.00	0.00
Schuck Law, LLC	0.00	0.00	0.00	0.00	5,500.00	0.00
Settlement Payments	2,658.00	8,782.71	35,971.79	32,600.00	31,693.77	0.00
Smith & Fjelstad Law Office	0.00	0.00	30,000.00	0.00	0.00	0.00
Sokol & Foster, PC	0.00	0.00	0.00	24,500.00	0.00	0.00
State of Oregon	2,295.11	9,186.85	0.00	614.56	0.00	0.00
Stoel Rives, LLP	0.00	0.00	9,266.00	4,600.00	33,128.00	6,646.00
Stoll Berne	0.00	0.00	0.00	0.00	17,438.50	0.00
Stoneycreek Strategies, LLC	0.00	0.00	0.00	5,481.25	6,248.75	0.00
Susan Leeson	0.00	1,012.50	0.00	0.00	0.00	0.00
Susan Nisbet	0.00	1,277.86	0.00	0.00	0.00	0.00
Theresa Payne	0.00	0.00	0.00	0.00	10,000.00	0.00
Tonkin Torp, LLC	0.00	0.00	0.00	8,475.00	7,620.00	0.00
William F. Reeves	3,440.96	2,789.19	0.00	0.00	0.00	0.00
<b>Actual Expenditures by Law Firm</b>	<b>\$ 550,390.69</b>	<b>\$ 1,187,559.04</b>	<b>\$ 1,049,331.37</b>	<b>\$ 1,365,553.03</b>	<b>\$ 1,732,867.20</b>	<b>\$ 165,778.88</b>

#### Additional Payments from Superintendent's Office

	FY 2012-13	FY 2013-14	FY 2014-15	FY 2015-16	FY 2016-17	FY 2017-18
Harrang, Long, Gary & Rudnick, PC	\$ -	\$ -	\$ -	\$ -	\$ 16,459.85	\$ 16,185.00

**General Counsel FTE - Dept. 5460**

	<b>2012-13</b>	<b>2013-14</b>	<b>2014-15</b>	<b>2015-16</b>	<b>2016-17</b>	<b>2017-18</b>
<b>Budgeted FTE</b>	<b>2.50</b>	<b>5.50</b>	<b>6.50</b>	<b>7.00</b>	<b>7.00</b>	<b>7.75</b>

<b>FTE Utilized</b>	<b>2012-13</b>	<b>2013-14</b>	<b>2014-15</b>	<b>2015-16</b>	<b>2016-17</b>	<b>2017-18</b>
Brian Baker					1.00	1.00
Elizabeth Brownhill						0.75
Jeffrey Fish					1.00	
Suzy Harris		1.00	1.00	1.00		
Stephanie Harper		1.00	1.00	1.00	1.00	1.00
James Harris						1.00
Josie Hashemian	1.00					
Mary Kane						1.00
Gena King						1.00
Rachel Lent	0.60	0.60	0.60	1.00	1.00	1.00
Jollee Patterson	0.90	0.90	0.90	0.90		
Maureen Retherford		1.00	1.00	1.00	1.00	1.00
Jeanne Windham			1.00	1.00	1.00	
<b>Total FTE Utilized</b>	<b>2.50</b>	<b>4.50</b>	<b>5.50</b>	<b>5.90</b>	<b>6.00</b>	<b>7.75</b>



# Board of Education Informational Report

## **MEMORANDUM**

**Date:** October 19, 2017  
**To:** FAO Committee  
**From:** Harry Esteve, Director of Strategic Communications and Outreach  
**Subject:** Peach Jar & Flyer Distribution

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The attached background material is a summary of the work done over the summer to review the district's flyer distribution process and the use of the Peachjar service.

The information summarizes the history of flyer distribution at PPS, how other similarly sized districts manage flyer distribution from private entities, and the work of a committee that Community Involvement and Public Affairs (CIPA) organized and led throughout the spring and summer to evaluate and develop recommendations for how the district should move forward on Peachjar as well as flyer distribution.

The work was completed with the goal to have a new system in place by the beginning of the 2017-18 school year, however with the various leadership transitions the timeline was postponed until a new superintendent was in office.

We are prepared to discuss the background and our recommendations to the superintendent and answer any additional questions you may have about our review of the service and overall flyer distribution practices.





# Flyer Distribution at PPS

## Summary

The PPS Flyer Distribution Process Review Committee recommends that the district should move away from providing any sort of flyer distribution system on behalf of non-governmental outside organizations and should discontinue the use of Peachjar for a number of reasons:

- Inequities in flyer distribution
- Lack of translation
- Additional workload for district staff
- Parent concerns about being “spammed”

The committee also recommended that the district discontinue any service to facilitate flyer distribution for private entities that are not direct partners with PPS in advancing the educational mission of the district. This recommendation was rooted in two issues: 1) Liability and lack of ability to do thorough background checks and validation of the offerings; and 2) The labor and resources necessary for this service are significant and do not directly align with the district’s focus on student achievement.

## History

The Portland Public Schools (PPS) Board Policy (3.30.035-P) that covers flyer distribution was established in May 2005 and the Administrative Directive (3.30.038-AD) further clarifying this work was established in February 2006 and amended in May 2008.

## Contacts

### Coordinator/ Executive Assistant

Lindsay Trapp  
[ltrapp@pps.net](mailto:ltrapp@pps.net)

### Director of Strategic Communications & Outreach

Harry Esteve  
[hesteve@pps.net](mailto:hesteve@pps.net)

In the several years prior to 2009, Rudy Rudolph managed flyer distribution for the district. There was a link on the main PPS webpage that took users to the Distribution of Materials site. On that site, requesters would fill out a form detailing organization and contact information. Requesters attached their flyer to the form and electronically submitted them together. Rudy checked the site daily, printed out forms with their accompanying flyers, and reviewed each flyer to ensure it was in compliance with district policy. If the flyer was acceptable, Rudy completed an individualized letter of acceptance and sent that to the requester. Outside organizations were responsible for taking the flyer to schools with their acceptance letter. If a flyer was denied, Rudy wrote a letter of denial stating the reason why the flyer was denied. Flyers were approved for a duration of one year. Rudy expressed that this process required a great deal of time, particularly in August before the start of school and in May when summer activities were being publicized.

The system that Rudy set up was taken over by the Community Involvement & Public Affairs (CIPA) department in 2009 and they continued to manage the work exactly the same way, with one staff member reviewing, approving and sending letters of acceptance or denial to outside organizations requesting to distribute their flyers to PPS school communities.

In January 2016, as part of the district's Mobile First initiative (a multi-year plan to shift communications between schools and families to mobile devices), PPS introduced and started using Peachjar, an online system for flyer distribution. Outside organizations create a Peachjar account and submit their flyers through the system. A central office approver, which has been the Confidential Executive Assistant in CIPA since Peachjar was introduced, reviews the flyers to ensure they meet district policy. If so, they get approved and emailed directly to PPS parent/guardian emails. Those emails are pulled directly from Synergy, our student information system. After a flyer is approved through Peachjar, hard copies of it can be distributed to the schools for which it was approved. Outside organizations are responsible for making the hard copies.

As stated on the "Promoting events and activities in PPS schools" webpage, the benefits of Peachjar include the following:

- Reduce paper and printing costs for schools, PTAs and the district.
- Decrease paper waste for parents.
- Decrease staff time spent printing (should there not be enough) and distributing flyers.
- Keep families well-informed of district and school events, and community enrichment opportunities, by sending e-flyers directly to parent and guardian emails.
- Decrease costs for community partners and organizations who wish to distribute flyers in our schools.
- Allow school and student organizations such as PTAs and boosters to distribute flyers electronically for free.

The set-up and push to adopt Peachjar was led by CIPA leadership who no longer work for PPS. Neither 3.30.035-P nor 3.30.038-AD were updated to directly address the use of Peachjar.

Training for staff consists of an online tutorial video. This training is not mandatory and staff completion of the training has not been tracked. After Peachjar was launched, there was no follow-up or continued support for staff.

PPS is currently in the middle of its third contract with Peachjar, which expires in June 2018. Peachjar is a zero-dollar contract, meaning it doesn't cost PPS anything to use the service. Flyers for PPS programs, government agencies, and organizations that are on contract with PPS can be distributed for free. All other outside organizations, however, must pay to use the service. Funds collected for the use of this service all go back to Peachjar.

## **Committee established to review flyer distribution process**

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In March 2017, a PPS parent and Board member expressed concerns about the use of Peachjar. These concerns prompted CIPA staff to conduct an internal review of Peachjar as well as flyer distribution as a whole at PPS. Following this internal review, it was determined that a committee should be pulled together to develop a plan on how to manage flyer distribution going forward.

The following people were invited and agreed to be part of the PPS Flyer Distribution Process Review Committee: Harry Esteve (Director of Strategic Communications & Outreach), Rosie Fiallo (Communications Manager), Valeurie Friedman (Wilson High School Tech Specialist), Stephanie Hays (PPS parent), Trish Hendry (ACCESS Principal's Secretary), Netsanet Muleta (Translation & Interpretation Administrative Secretary), Rudy Rudolph (PPS Retired Administrator/Limited Term Employee), Lindsay Trapp (CIPA Coordinator/Executive Assistant) and Ryan Vandehey (Public Records Officer). Below are details about what was discussed and decided at each committee meeting and a final recommendation on how to move forward.

## **Meeting # 1 – June 21, 2017**

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Member introductions and a discussion of the committee's purpose opened the first PPS Flyer Distribution Process Review Committee meeting. An overview of the current process was summarized, including what is stated on the PPS website, looking at the Policy and Administrative Directive related to flyer distribution, and reviewing the current contract with Peachjar. The history of flyer distribution at PPS, found at the beginning of this memo, followed by how some other districts manage flyer distribution was shared with the committee. Finally, frequent issues and complaints that essentially spurred the creation of this committee were brought up. Below are the exact details shared.

### **Purpose of committee –**

Review the current flyer distribution process and make recommendations for changes that would ideally be introduced in fall 2017.

### **How other districts manage flyer distribution –**

In reaching out to other school districts, both here in Oregon and across the country, to see how they manage flyer distribution, CIPA staff received responses which basically illustrate that no other district has found a method much different than PPS has tried (Rudy's system and Peachjar). Below are the basic replies. The size of the district is noted in parentheses because it's important to recognize the actual magnitude of work the process may take to complete.

- *Beaverton School District (Beaverton, Oregon – 40,806 students)* – Expressed that their Communications department receives about 70 requests per month and manually reviews each flyer before they are emailed to each school and posted on their Community Connections webpage for future reference.
- *Hillsboro School District (Hillsboro, Oregon – 20,686 students)* – Openly shared that they are resisting the trend towards Peachjar because they don't want to charge their community partners for the service. Their current system involves an online request form and the Communications Director reviewing flyers each week.
- *Omaha Public Schools (Omaha, Nebraska – 52,304 students)* – Flyers at this district are only allowed to be posted on their website and cannot be distributed any other way. Outside organizations pay the district a small fee to be included on their website. Funds collected are used to enhance some of their communication efforts. They have considered moving towards Peachjar in the past, but are concerned about equity amongst schools and the fact that Peachjar keeps all the proceeds.
- *Orange County Public Schools (Orlando, Florida – 203,340 students)* – This district allows outside organizations to buy advertising space on their website or in their newsletters. Many of their schools use LightbulbPR to distribute news digitally via email and this is where most advertising takes place. Their policy regarding flyer distribution is 14 years old and being revised this year.
- *Pittsburgh Public Schools (Pittsburgh, Pennsylvania – 24,652 students)* – Considering moving towards Peachjar, but presently has their Public Information Officer handle flyer distribution approvals through an online request form.
- *Richmond Public Schools (Richmond, Virginia – 23,987 students)* – Currently, flyer approval goes through their Office of Communications & Media Relations and involves an outside organization simply sending their materials in for approval. Richmond Public Schools is planning to launch Peachjar in the near future.
- *Saint Paul Public Schools (Saint Paul, Minnesota – 37,605 students)* – This district's Family Engagement office approves flyers for distribution through a manual process very similar to Rudy Rudolph's system previously outlined.
- *Salem-Keizer Public Schools (Salem, Oregon – 43,006 students)* – Stopped providing flyer distribution service because it took lots of staff time to manage and they were receiving complaints about flyers being distributed. No district resources are spent on distributing flyers.
- *Seattle Public Schools (Seattle, Washington – 54,976 students)* – Seattle Public Schools currently uses a manual/paper process that is very cumbersome for their school office staff and isn't efficient to track. They are exploring the possibility of moving towards using Peachjar.

#### **Frequent issues/complaints –**

- *Differing interpretations of policy and AD* – The policy and AD language are subject to interpretation, and thus, there hasn't been consistency in the types of flyers, specifically those from non-governmental organizations, approved for distribution. This issue will come up regardless of the system we use (Rudy's management versus Peachjar, for example).
- *Peachjar sends too many emails and/or parents aren't even reading them* – Some parents have shared that they are receiving too many emails from Peachjar, so they just delete them without even reading. Peachjar let us know that since January 1, 2017, parents have received, on average, 22.8 emails, which breaks down to about one email every 3.3 days. Other parents haven't complained about the frequency of emails, but admit they, too, do not read any of the Peachjar flyer emails. Parents may not be aware that they can choose to opt out of receiving Peachjar emails or change their email frequency preference.
- *No central office review of flyers sent by school staff* – School staff can send out whatever they want through Peachjar without central office approval. This situation likely happened with Rudy's system, too, because principals and secretaries aren't necessarily familiar with the policy and AD and don't know when they need central office approval or what is acceptable to be sharing with families.
- *Management of system requires a lot of staff time* – The system managed by Rudy Rudolph took a lot of staff time, not only from Rudy herself, but also for school office staff who had to organize and distribute flyers from outside organizations as they were dropped off. To give an idea of how many flyers we receive for distribution, a recent report from Peachjar informed us that we distributed over 2,700 flyers from external, for-profit organizations alone between August 1, 2016, and March 15, 2017. Ultimately, a great deal of staff time has been devoted to this non-essential task of promoting programs for outside organizations.
- *PPS liability for student abuse/injury at advertised program* – There is an inherent liability issue anytime PPS advertises for outside organizations. For example, if a student is injured at one of the programs promoted through the PPS flyer distribution system, it may be perceived that PPS is responsible for the child being put in that situation, even though the program is not district-sponsored. This could occur in any sort of flyer distribution system.
- *Inequity among schools receiving fliers* – Finally, and most importantly, there's a major equity problem developing as a result of outside organizations being able to pick and choose which school communities they advertise their programs to. Thus, the students in schools where more extracurricular activities are offered will have greater access to such programs. Additionally, there are no translation requirements for flyers, so non-English speaking students are essentially ignored. Similar to most of the other issues mentioned above, this equity problem may come up regardless of the type of system used for flyer distribution.

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## Meeting # 2 – June 28, 2017

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At the second meeting, the PPS Flyer Distribution Process Review Committee discussed the pros and cons of PPS providing any sort of flyer distribution service to outside organizations. The goal was to come away with a consensus on whether PPS should move away or continue to provide this service. Below is what the committee came up with.

*Pro's –*

- Service to community/families/students
- Third party neutrality (something that Peachjar provides)
- Low cost publicity for outside organizations
- Some principals like it
- Peachjar is environmentally friendly

*Con's –*

- Workload for PPS staff
- Cost to users (related to Peachjar)
- Too many emails for parents, most are very vague (related to Peachjar)
- No distinction between for-profit and non-profit organizations
- Equity issues
- Not central to PPS mission
- Outside organizations target schools to advertise to
- Flyers are not translated
- Inequitable access to events and flyers themselves
- Legal issues
- PR issues

*Questions to consider –*

- If we stop providing this service, would school staff see an increase in workload related to flyer distribution?
- If we continue to provide this service, how would we make sure flyers are translated? Or how would we translate them?
- If we continue to provide this service, how do we staff the work?
- If we continue to provide this service, who has access to distribute to our schools?
- If we continue to provide this service, how do we limit the number of flyers coming in and/or narrow the scope of types of flyers we will distribute?

## **Meeting # 3 – July 19, 2017**

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The plan for the third meeting was to explore the unintended consequences and next steps if PPS chooses to either move away from providing any sort of flyer distribution for outside organizations or continue to provide the service, but likely through a different system than Peachjar and with new rules/restrictions.

The main unintended consequences if PPS moves away from providing any sort of flyer distribution system were:

- For schools/departments (mainly Athletics) that share PPS events/info through Peachjar, we will have to give them an alternative to Peachjar (such as School Messenger).
- Students may not find out about extra-curricular activities/opportunities.

- It will be a lot of work to communicate about this change.

The main unintended consequences if PPS continues to provide flyer distribution service through a different system than Peachjar and with new rules/regulations:

- Going back to a more manual system will require additional staff time – do we have the capacity to take on this workload and is it a priority compared to other projects/tasks in CIPA?
- We will need to set up new rules/regulations that include translation requirements.

The full committee agreed that moving away from providing any sort of flyer system to non-governmental outside organizations and discontinuing the use of Peachjar was the most prudent route to take. This is mostly due to the equity issues and staff workload required to manage the process. This direction also doesn't require any updates or changes to the current policy and AD.

## **Meeting # 4 – July 26, 2017**

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The agenda for the fourth meeting was to put together a plan that outlines how PPS will thoroughly communicate this change in flyer distribution service. The communications plan agreed upon is outlined below.

*Goal* – Communicate change in flyer distribution service at Portland Public Schools

*Audience* – Who should be informed of change?

- Superintendent Direct Reports
- IT/CIPA staff – will need to modify school websites (remove Peachjar link)
- Peachjar – to terminate contract
- Principals and school office staff
- Outside organizations
- Parents
- Community partners

*Timeline* – When should this information be delivered?

- Ideally before first day of school (sometime between August 18-23), start sharing that the change is coming
- Change will not go into effect until November 1 – need to terminate Peachjar contract (requires 30-days' notice) and IT/CIPA need time to modify school websites (remove Peachjar link)

*Tools* – What communications channels will be used to deliver the message?

- Website
  - Feature story about change on home page and staff page (modify principal/staff or parent message for posting)
  - Update narrative on flyer distribution webpage (<https://www.pps.net/site/Default.aspx?PageID=2588>)
- Email – parents (through School Messenger) and community partners (through Kimm's contacts)
- Admin Connection – principals and school staff

*Actual Message Content –*

- Message to principals and school staff –
  - Explain briefly why we are no longer providing the service to non-governmental outside organizations
    - Emphasize that it is the responsibility of the district to assure that district resources are focused on student achievement
  - Clarify ways to communicate district/school-sponsored events without Peachjar (hard copy flyers, school email list serves, School Messenger, post on school webpage)
  - Explain who can still drop off flyers without district approval, which include governmental agencies, school foundations, individual parent teacher groups (affiliated with the Portland Council) and individual booster clubs (affiliated with and recognized by individual schools)
  - Post this email on any community bulletin boards where you have been displaying flyers from outside, non-governmental agencies
  - Contact Comms with questions ([pubinfo@pps.net](mailto:pubinfo@pps.net) or 503-916-3304)
- Message to parents and community partners (NEEDS TO BE TRANSLATED) –
  - Explain briefly why we are no longer providing the service to non-governmental outside organizations
    - Emphasize that it is the responsibility of the district to assure that district resources are focused on student achievement
  - Clarify what information they will no longer get and what they will still get
    - No longer getting anything from outside organizations
    - Will still get information from governmental agencies, school foundations, individual parent teacher groups (affiliated with the Portland Council) and individual booster clubs (affiliated with and recognized by individual schools)
  - Include link to CUB calendar so that they can view what's happening in their school
  - Contact Comms with questions ([pubinfo@pps.net](mailto:pubinfo@pps.net) or 503-916-3304)
- Message to outside organizations
  - Explain briefly why we are no longer providing the service to non-governmental outside organizations
    - Emphasize that it is the responsibility of the district to assure that district resources are focused on student achievement
  - Include process for which they can get a refund from Peachjar if they end up having unused credits come October 31
    - Eligible for monetary refund less the 10% processing fee
    - Contact Allison Bennett at [allisonbennett@peachjar.com](mailto:allisonbennett@peachjar.com) or (858) 997-2117 ext. 130
- Narrative on flyer distribution webpage
  - Explain briefly why we are no longer providing the service to non-governmental outside organizations



- Emphasize that it is the responsibility of the district to assure that district resources are focused on student achievement
- Explain who can still drop off flyers without district approval, which include governmental agencies, school foundations, individual parent teacher groups (affiliated with the Portland Council) and individual booster clubs (affiliated with and recognized by individual schools)
- Include link to CUB calendar so that people can view what's happening at their school
- Contact Comms with questions ([pubinfo@pps.net](mailto:pubinfo@pps.net) or 503-916-3304)

## **Recommendation and next steps**

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The PPS Flyer Distribution Process Review Committee recommends that district should move away from providing any sort of flyer distribution system on behalf of non-governmental outside organizations and should discontinue the use of Peachjar.

The committee also recommended that the district discontinue any service to facilitate flyer distribution for private entities that are not direct partners with PPS in advancing the educational mission of the district. This recommendation was rooted in two issues: 1) Liability and lack of ability to do thorough background checks and validation of the offerings; and 2) The labor and resources necessary for this service are significant and do not directly align with the district's focus on student achievement.

This recommendation will go to the new superintendent for consideration. If this recommendation is accepted and implemented, it does not require any updates or changes to the current policy and AD.

To clarify, under this recommendation, in accordance with district policy, governmental agencies, such as Portland Parks & Recreation and the Oregon Zoo, can still drop off flyers at PPS sites and those can be distributed without central office approval. Additionally, district-sponsored events, such as those organized by parent teacher groups and school booster clubs, will still be shared with families. The proposed changes specially apply to non-profit and for-profit non-governmental agencies.