

**BOARD OF EDUCATION**

Portland Public Schools  
**Study Session**  
**January 9, 2012**

**Windows Cafeteria**

Blanchard Education Service Center  
501 North Dixon Street  
Portland, Oregon 97227

**Note:** Those wishing to speak before the School Board should sign the citizen comment sheet prior to the start of the regular meeting. No additional speakers will be accepted after the sign-in sheet is removed, but citizens are welcome to sign up for the next meeting. While the School Board wants to hear from the public, comments must be limited to three minutes. All citizens must abide by the Board's Rules of Conduct for Board meetings.

Citizen comment related to an action item on the agenda will be heard immediately following staff presentation on that issue. Citizen comment on all other matters will be heard during the "Remaining Citizen Comment" time.

This meeting may be taped and televised by the media.

**STUDY SESSION AGENDA**

1. **CITIZEN COMMENT** 5:00 pm
2. **UPDATE: EQUITY POLICY IMPLEMENTATION PLAN** 5:20 pm
3. **UPDATE: ON-LINE LEARNING** 6:00 pm
4. **BUSINESS AGENDA** 6:20 pm
5. **UPCOMING AGENDA REVIEW** 6:25 pm
6. **ADJOURN STUDY SESSION** 6:35 pm
7. **BREAK**
8. **ENROLLMENT BALANCING PUBLIC HEARING** 7:00 pm

The next Study Session of the Board will be held on **January 17, 2012** at **5:00 pm** in the Windows Cafeteria Room at the Blanchard Education Service Center.

**Portland Public Schools Nondiscrimination Statement**

Portland Public Schools recognizes the diversity and worth of all individuals and groups and their roles in society. All individuals and groups shall be treated with fairness in all activities, programs and operations, without regard to age, color, creed, disability, marital status, national origin, race, religion, sex, or sexual orientation.

Board of Education Policy 1.80.020-P



**PORTLAND PUBLIC SCHOOLS**

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**Office of Equity and Partnerships**

**Lorenzo T. Poe, Jr.**  
Chief Equity Officer  
Director of Partnership Development

January 3, 2012

**MEMORANDUM**

To: PPS Board of Education

From: Lorenzo Poe

Subject: Racial Equity Plan Update

**PROGRESS TO DATE**

In October we shared a proposed process for the design, implementation and delivery of the District's Equity Plan along with a draft of the District's 3-5 year Equity Plan. Since then, the Superintendent's cabinet has revised the 3-5 Year Equity Plan. In addition, 2011-2012 annual work plans have been developed, and implementation is currently underway.

Attached are two documents for your review. The first, **Appendix A**, is the revised **3-5 Year Equity Plan** which outlines key strategies that will be employed in order to meet each of the six goals stated in our racial educational equity policy (2.10.010-P). Listed along with each strategy is its corresponding intended outcome, executive sponsor and staff lead.

The second, **Appendix B**, is a summary document of the **2011-2012 Annual Equity Plan**. This document aligns the aforementioned key strategies with annual actions and year-end outcomes. It also identifies the January progress indicator for each of the actions. (January progress indicators are expected to be met by the end of January or by February 1<sup>st</sup>.) Please note that the Annual Equity Plan only contains work that was approved in the 2011-2012 budget.

**NEXT STEPS**

We will continue to monitor the 2011-2012 Annual Equity Plan and plan to report progress to the Board again in June and September of this year.

This year's Priority-Based Budget process will inform next year's Annual Equity Plan. Community organizations and partners who are invested in our Equity Plan will be consulted and included in the Priority-Based Budget process this year.

Appendix A: PPS Racial Equity Plan  
3-5 Year Plan (2011-2016)  
Version 1.3.12

	Racial Equity Goal	Strategic Priority	Priority Strategy	Intended Outcome	Executive Sponsor	Owner
<b>A</b>	Achieve equitable student access to high quality, culturally relevant instruction & resources	All	1 Design and implement district-wide use of a Racial Equity Lens to provide a common vocabulary and protocol for evaluating policies, programs, practices and decisions for racial equity.	Purposeful consideration of racial equity in policies, programs, practices and decisions which result in more equitable outcomes for students and families of color.	Lorenzo Poe	Lorenzo Poe & Jeanine Fukuda
		Rigorous, relevant programs for all	2 Integrate core instruction and differentiate supports to all students including students with disabilities, English Language Learners, and TAG.	Increase achievement in reading, writing, and math for all students while narrowing the racial achievement gap.	Carla Randall	Carla Randall, Melissa Goff, Robert Ford, Ewa Chomka-Campbell
		Effective educators	3 Develop the PPS Response to Intervention (RtI) model with a racial equity lens--with a primary focus on quality core instruction for every student.	Increased achievement in reading, writing and math for all students while narrowing the achievement gap.	Carla Randall	Melissa Goff & Ewan Brawley
		Rigorous, relevant programs for all	4 Implement the common agreements in the High School System Redesign plan.	Equitable access to strong core programs and differentiated supports for all students attending a comprehensive high school increases graduation rates for students of color.	Carla Randall	Trip Goodall
		Individual student supports	5 Increase culturally responsive academic interventions in math and reading.	Increased achievement for all students with a narrowing of the racial achievement gap in math and reading.	Carla Randall	Melissa Goff & Ewan Brawley
		Stable operating model	6 Balance enrollment (with a racial equity lens) through boundary changes, grade reconfigurations, etc. to ensure that every student has access to a strong core program.	All schools have enrollment within the target range and every student has access to a strong core program.	Zeke Smith	Zeke Smith & Judy Brennan
		Modernize infrastructure	7 Develop a long range facility plan with a racial equity lens.	A guide for district decision-making to ensure that facilities resources are both culturally responsive and equitably distributed.	CJ Sylvester	CJ Sylvester & Tony Magliano

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Racial Equity Goal		Strategic Priority	Priority Strategy	Intended Outcome	Executive Sponsor	Owner
<b>A</b>	Achieve equitable student access to high quality, culturally relevant instruction & resources	All	8 Establish a MWESB (Minorities, Women & Emerging Small Business) program.	MWESB program established with demonstrated annual growth in the number of contracts secured with minority-owned, women-owned and emerging small businesses.	Neil Sullivan	Dave Fajer
<b>B</b>	Create multiple pathways to success & expect high achievement for every student	Rigorous, relevant programs for all	1 (See A4 above)	(See A4 above)	Carla Randall	Trip Goodall
		Rigorous, relevant programs for all	2 Provide equitable access to effective dual language programs for students in their first language.	Access to programs for students in their first language leads to student achievement growth for English Language Learners.	Carla Randall	Carla Randall & Antonio Lopez & Ewa Chomka-Campbell
<b>C</b>	Develop a racially and linguistically diverse & culturally competent workforce	Effective educators	1 Facilitate development, adoption and implementation of an affirmative action policy.	Ability to implement the Oregon Minority Teachers Act so that our workforce will reflect the diversity of the students we serve.	Jollee Patterson & Lorenzo Poe	Jollee Patterson & Lorenzo Poe

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C	Develop a racially and linguistically diverse & culturally competent workforce	Effective educators	2 Employ recruitment and retention strategies to increase the racial and linguistic diversity of our workforce.	In accordance with the Oregon Minority Teacher Act, our workforce will reflect the racial and linguistic diversity of the students and families we serve.	HR Executive Director	Michelle Riddell & Bonnie Gray
		Effective educators	3 Redesign the recruitment & hiring processes to include cultural competence as a criteria for all staff positions.	Increased cultural competence of our organization and an increased ability to meet the needs of all students and families we serve.	HR Executive Director	Michelle Riddell & Bonnie Gray
		Effective educators	4 Establish common understanding and utilization of the new performance rubric for teacher effectiveness which includes cultural competence.	Increased consistency in feedback to teachers with a racial equity lens.	Carla Randall	Carla Randall & Sascha Perrins
		Effective Educators	5 All schools not yet at Beacon status will engage in Equity Team seminars and coaching support to develop a racial lens for decisions at their school.	School improvement plans will include data disaggregated by race and actions to raise achievement for all students while narrowing the racial achievement gap.	Carla Randall	Regional Administrators
		Effective Educators	6 Develop and implement standard conversations for Regional Administrators and Teaching & Learning staff to support principals to lead for equity and excellence.	Supervisors of principals will increase their capacity to coach principals to implement equitable access and high academic standards for all students with specific direction to not allow status quo.	Carla Randall	Carla Randall, Toni Hunter & Regional Administrators
		Effective educators	7 Teams of teachers from each of the 12 Beacon Schools will develop their skills in implementing culturally relevant instructional strategies through engagement with Pacific Educational Group seminars, coaching, and action research.	All teachers in the 12 Beacon Schools will be trained in culturally relevant instructional strategies and will actively utilize these strategies in the classroom.	Carla Randall	Carla Randall & Melissa Goff

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<b>D</b>	Remedy practices that lead to disproportionality in discipline referrals and special programs	Individual student supports	1 Increase the capacity in school leaders and central support staff to implement culturally responsive positive behavior support systems in the Academic Priority Zone Schools.	Referral rates for exclusionary discipline and special programs will not be predictable by race in Academic Priority Schools.	Carla Randall	Melissa Goff, Tammy Jackson & Robert Ford
		Effective educators	2 Special Education administrators will engage in seminars & coaching with a consultant from Pacific Educational Group to establish a new focus on instruction with a racial lens and integration with teaching and learning rather than compliance.	Decrease in the number of students placed in self-contained classrooms.	Carla Randall	Carla Randall & Robert Ford
		Rigorous, relevant programs for all	3 Each school will include an equity plan with their school improvement plan.	Schools will identify and implement specific actions to close the racial achievement gap and raise student achievement for all students.	Carla Randall	Toni Hunter & Regional Administrators
		Individual student supports	4 Work with community partners around discipline data at specific schools to provide supports for students of color.	Community involvement and support leads to decrease in exclusionary discipline for students of color.	Carla Randall	Melissa Goff & Tammy Jackson
<b>E</b>	Cultivate staff & student understanding of their own racial identity	Effective educators	1 Every staff member engages in the Courageous Conversations work in a differentiated model.	Each staff member will increase their own understanding of their racial identity and seek ways to eliminate institutional racism when they observe it.	Carla Randall & Lorenzo Poe	Executive Cabinet
		All	2 School administrators, central instructional administrators and central office leadership engage in monthly equity professional learning communities (PLCs).	Principals and central office leaders display increased capacity and confidence to engage their staff in courageous conversations about race.	Carla Randall & Lorenzo Poe	Carla Randall & Lorenzo Poe

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<b>F</b> Welcome and empower students and families of color & engage partners with culturally-specific expertise	Collaboration with families & communities	1 Develop and implement a framework for equitable, transparent & consistent stakeholder engagement which clarifies roles & responsibilities and reduces barriers to participation for underserved communities.	Improved communication with clarity of stakeholder roles & responsibilities along with increased participation of stakeholders from underserved communities, including language minority communities.	Zeke Smith	Robb Cowie
	Collaboration with families & communities	2 All schools will develop and execute a parent engagement plan as part of their School Improvement Plan (SIP Plan) that includes culturally-specific strategies for their neighborhoods and partners, focusing on connecting parents to the instructional goals of their school.	Increase in the number of culturally-specific parent engagement opportunities offered at each school.	Carla Randall & Zeke Smith	Toni Hunter, Regional Administrators & Reiko Williams
	Collaboration with families & communities	3 The ESL department will use the guidelines of Title III to establish supplemental supports to better engage families of ESL students.	Transitional, cultural & leadership programs will be available for parents of ESL students, resulting in increased engagement.	Carla Randall	Ewa Chomka-Campbell
	Collaboration with families & communities	4 Facilitate parent/family trainings with targeted outreach to underserved families.	Increased parent opportunities to support student achievement.	Zeke Smith	Reiko Williams

**Appendix B**  
**PPS Racial Equity Plan**  
**2011-2012 Annual Work Plan Update**

	Strategy	2011-2012 Actions	Year-End Intended Outcome	Jan 2012 Progress Indicator(s)	Owner	Sponsor
A1	Design and implement district-wide use of a Racial Equity Lens to provide a common vocabulary and protocol for evaluating policies, programs, practices and decisions for racial equity	(1) Practice use of Equity Lens Tool with operational department staff	Increased capacity & confidence of operational support departments' leadership to use the Equity Lens Tool	Evidence from Equity Lens Tool documents indicates increased consideration of race in decision-making	Lorenzo Poe & Jeanine Fukuda	Lorenzo Poe
			Increased consideration of race in decision-making with operational support departments' leadership	Feedback from participants indicates that practice sessions are useful in helping managers purposefully consider race in decision-making		
A2	Integrate core instruction and differentiate supports to all students including students with disabilities, English Language Learners, and TAG	(1) Provision of core math and reading content materials and professional development for all K-5 classroom teachers, including special education	Lower percentages of K-5 students, in particular students of color, will be in need of intensive math or reading services	All K-5 special education classroom teachers receive core literacy curriculum materials	Melissa Goff	Carla Randall
		(2) Provision of Sheltered Instruction training for all K-12 teachers and administrators	Increased percentage of ELL students meeting Milestone benchmarks; increased percentage of ELL students meeting AMAO's	Year One or Two Sheltered Instruction training is underway in each of schools	Bob Tourtillot	
		(3) Provision of teacher professional development in differentiation for talented and gifted students	Increased engagement of TAG students as indicated by TAG student surveys	TAG professional development scheduled for all schools by end of June 2012	Pat Thompson	



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	Strategy	2011-2012 Actions	Year-End Intended Outcome	Jan 2012 Progress Indicator(s)	Owner	Sponsor
A2	Integrate core instruction and differentiate supports to all students including students with disabilities, English Language Learners, and TAG	(4) Implementation of Professional Learning Communities to address racial achievement gap at remaining 7 K-8 schools	Increased achievement for all students in targeted subject area; closure of racial achievement gap in targeted subject area	7 participating schools and the RA team have identified a learner-centered problem and problem of practice; in addition, schools have identified targeted instructional strategies to address problem of practice and impact student results	Melissa Goff	Carla Randall
A3	Develop the PPS Response to Intervention (RtI) model with a racial equity lens--with a primary focus on quality core instruction for every student	(1) Regional Administrators review implementation of RtI in 2011-12 zone schools	Zone schools' schedules are aligned with minimum requirements for core curriculum in reading and mathematics	RtI rubric is revised and provided to Regional Administrators	Ewan Brawley	Carla Randall
		(2) Provide schools with core curriculum and screening and benchmarking assessments for reading and math	Zone schools have access to core curriculum in reading and mathematics and corresponding professional development	Budget process for expansion of core curriculum and assessment purchases is complete	Ewan Brawley	
A4	Implement the common agreements in the High School System Redesign plan	(1) Clearly define the effective integration of Career & Technical Education (CTE) programs at Benson and articulate how they support graduation requirements	Students have access to rigorous career and technical education program and there is growth in the percentage of students of color on track to graduate	New schedule and program are implemented and reviewed	Trip Goodall	Carla Randall

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	Strategy	2011-2012 Actions	Year-End Intended Outcome	Jan 2012 Progress Indicator(s)	Owner	Sponsor
A4	Implement the common agreements in the High School System Redesign plan	(2) Develop and implement the new middle college program at Jefferson High School	Middle college program has created growth in percentage of students of color on track to graduate and with college credit	Freshman academies are implemented under new middle college model	Trip Goodall	Carla Randall
A5	Increase culturally responsive academic interventions in math and reading	(1) Conduct a needs assessment and gap analysis for core instruction's cultural responsiveness and alignment with the common core	Common core state standards are implemented across schools in phase 1 grades	Developing plan for evaluating PPS core curriculum's alignment with common core state standards	Ewan Brawley	Carla Randall
		(2) Evaluate current intervention and assessment systems	Alternative assessments are in place across the District	Alternatives to easy CBM are identified and being piloted in 5 schools	Ewan Brawley	
		(3) Support zone schools to implement Response to Interventions	School Improvement Specialists' support is embedded into zone school practices	School Improvement Specialists in each zone school implementing RtI	Ewan Brawley	
A6	Balance enrollment (with a racial equity lens) through boundary changes, grade reconfigurations, etc. to ensure that every student has access to a strong core program	(1) Involve community partners that serve students & families of color as part of enrollment balancing process	Greater involvement of families and community organizations that support students of color in enrollment balancing process	Increased outreach through Somali PPS staff and Latino Network	Robb Cowie, Regional Administrators & Judy Brennan	Zeke Smith

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Strategy		2011-2012 Actions	Year-End Intended Outcome	Jan 2012 Progress Indicator(s)	Owner	Sponsor
<b>A6</b>	Balance enrollment (with a racial equity lens) through boundary changes, grade reconfigurations, etc. to ensure that every student has access to a strong core program	(2) Analyze boundary change & reconfiguration proposals using equity lens	Equity lens used regularly to shape process and decisions throughout enrollment balancing work	Analysis underway	Regional Administrators & Judy Brennan	Zeke Smith
		(3) Commence policy change discussions in light of recent Federal guidance on student assignment	Impact of boundary and configuration changes by race is analyzed and reported on as part of enrollment balancing work	Schedule developed for public advisory committee (SACET) and Board review	Judy Brennan	
<b>A7</b>	Develop a long range facility plan with a racial equity lens	(1) Conduct series of public meetings and gather stakeholder input	Board Approved methodology for capital investment decisions that takes historically underrepresented stakeholders into account	Enrollment Forecasting and Facility Conditions components of the plan are developed	Bob Alexander	CJ Sylvester
		(2) Board Adoption of Long Range Facilities Plan	Board Approved methodology for capital investment decisions that takes historically underrepresented stakeholders into account	A process that utilized public involvement in regular Facility Planning Committee meetings	Bob Alexander	
<b>A8</b>	Establish a MWESB (Minorities, Women & Emerging Small Business) program	(1) Board adoption and implementation of MWESB Policy/Administrative Directive	Increased consideration of race in procurement decision-making with operational support departments' leadership	DRAFT Policy/Administrative Directive approved by the Superintendent	Dave Fajer	Neil Sullivan
<b>B1</b>	Implement the common agreements in the High School System Redesign plan	See A4 above	See A4 above	See A4 above	See A4 above	See A4 above

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Strategy		2011-2012 Actions	Year-End Intended Outcome	Jan 2012 Progress Indicator(s)	Owner	Sponsor
<b>B2</b>	Provide equitable access to effective dual language programs for students in their first language	(1) Establish a data-driven process for identifying needs and potential locations for additional dual language immersion programs	Strategic and systemic program in place for current dual language immersion programs and community process begins for additional locations	Immersion team has been identified including staff from: Teaching and Learning, ESL, immersion and an RA. Data collection needs have been identified.	Carla Randall & Antonio Lopez	Carla Randall
<b>C1</b>	Facilitate development, adoption and implementation of an affirmative action policy	(1) Facilitate development & adoption of an affirmative action policy	Affirmative Action Policy adopted by the Board which reflects the goals and values of our Racial Educational Equity Policy and takes into account our desire to implement the Oregon Minority Teachers Act	External consultants interviewed and identified	Jollee Patterson & Lorenzo Poe	Jollee Patterson & Lorenzo Poe
<b>C2</b>	Employ recruitment and retention strategies to increase the racial and linguistic diversity of our workforce	(1) Human Resources will interview newly hired teachers with a focus on teachers of color to inform our recruitment strategies	Use the analysis to inform future recruitment strategies	Survey created and interviews scheduled	Bonnie Gray	Michelle Riddell
		(2) Human Resources will conduct exit interviews with a focus on teachers of color to identify retention strategies	Use the analysis to inform future recruitment strategies	Interview questions and data from last year are reviewed and revised as necessary	Bonnie Gray	

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C2	Employ recruitment and retention strategies to increase the racial and linguistic diversity of our workforce	(3) Human Resources will purposefully track and support a pool of teacher applicants who are culturally competent through the application and hiring process	Determine if this strategy improves our hiring and selection process of racially and linguistically diverse teachers	Candidate tracking spreadsheet developed	Bonnie Gray & Regina Stanton	Michelle Riddell
		(4) Increase the number of early letters of intent for elementary and immersion teachers who demonstrate strong understanding of cultural competency	Teachers will be more prepared for their new positions and satisfied with the hiring process	New hire and resignation data for the last three years analyzed and '12-'13 goals identified	Bonnie Gray & Regina Stanton	
C3	Redesign the recruitment & hiring processes to include cultural competence as a criteria for all staff positions	(1) Revise initial screening process so that all principal applicants respond and share their professional work experience related to the goals outlined under the Equity Policy.	Principals hired in '12-'13 will be able to identify how the district equity goals connect to building level equity initiatives	Track the number of candidates that successfully move forward in the process	John Blanck & Bonnie Gray	Michelle Riddell
		(2) All Principal candidates must pass the Equity Focused assessment in order to move forward in the hiring process	We are hiring principals who can sustain and grow the school-based and district equity work		John Blanck & Bonnie Gray	

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	Strategy	2011-2012 Actions	Year-End Intended Outcome	Jan 2012 Progress Indicator(s)	Owner	Sponsor
C3	Redesign the recruitment & hiring processes to include cultural competence as a criteria for all staff positions	(3) HR to partner with the Regional Administrators to jointly screen and interview Principal candidates	RA's will have a higher level of involvement with the principal screening and interview process	RA's will be partners with HR in screening and interviewing all principal candidates	John Blanck & Bonnie Gray	Michelle Riddell
		(4) Develop value added equity components to the AP/VP interview and screening process	We will have hired AP/VP's who can engage and sustain in the equity work at their buildings	Will review and revise the AP/VP screening and selection process to compliment the principal hiring process	John Blanck & Bonnie Gray	
		(5) Develop and integrate cultural competency in the Non-Represented hiring processes	Hiring Managers will embrace and integrate cultural competency as a factor in the interview and selection process in all vacant positions	Begin to review Non-Represented job posting to ensure cultural competency is integrated and a factor in the interview and selection process	Ramon Diaz & Bonnie Gray	
		(6) HR will define a set of core organizations and publications to post positions that reflect and represent diverse communities	Identified open positions will be posted consistently in diverse organizations and publications	HR will begin to work with the Equity and Partnership office to identify key organizations and publications we would like to advertise in on a consistent basis	Bonnie Gray & Regina Stanton	
		(7) HR will provide building administrators with training, support and resources for equity focused teacher interviews	Building Administrators will have sharpened their ability to identify culturally competent responses during interviews with teachers	Create training opportunities and resources for all building administrators	Michelle Riddell & Bonnie Gray	

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Strategy		2011-2012 Actions	Year-End Intended Outcome	Jan 2012 Progress Indicator(s)	Owner	Sponsor
C3	Redesign the recruitment & hiring processes to include cultural competence as a criteria for all staff positions	(8) Continue to improve our Substitute Teacher interview process with a focus on cultural competency	Building Administrators will be more involved in the substitute teacher hiring process and we will hire more culturally competent substitute teachers	Identify substitute pools that need to be posted	Patty Blanchard & Bonnie Gray	Michelle Riddell
C4	Establish common understanding and utilization of the new performance rubric for teacher effectiveness which includes cultural competence	(1) Implement the new evaluation tool across all schools	Pilot evaluation data demonstrates common utilization of new performance rubric	Principals have received additional professional development at leadership meetings regarding the new tool and have been implementing the evaluations	Carla Randall/ Sascha Perrins	Carla Randall
C5	All schools not yet at Beacon status will engage in Equity Team seminars and coaching support to develop a racial lens for decisions at their school	(1) School staff participate in Courageous Conversations about Race seminars	School Equity Teams have practiced enough with the tools that they can engage their staff in Courageous Conversations about race	Schools are prepared for first staff engagement in courageous conversations about race and have completed one seminar	Carla & Regional Administrators	Carla Randall
		(2) Equity work is prioritized for 2 hours per month of staff PD time	School Equity Teams have practiced enough with the tools that they can engage their staff in Courageous Conversations about race	Schools will start equity work in PD time	Carla Randall & Regional Administrators	
C6	Develop and implement standard conversations for Regional Administrators and Teaching & Learning staff to support principals to lead for equity and excellence	(1) Coaching for Equity Seminars	RAs have engaged principals in conversations that have resulted in improved access and higher academic standards	Staff will have participated in two coaching for equity seminars	Carla Randall	Carla Randall

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C6	Develop and implement standard conversations for Regional Administrators and Teaching & Learning staff to support principals to lead for equity and excellence	(2) Applying tools from Coaching for Equity	Schools are embedding coaching for equity tools in their coaching practices	Staff will have participated in two PreK-12 meetings using the ladder of inference and iceberg	Carla/PREK 12 Cabinet	Carla Randall
C7	Teams of teachers from each of the 12 Beacon Schools will develop their skills in implementing culturally relevant instructional strategies through engagement with Pacific Educational Group seminars, coaching, and action research	(1) Collaborative Action Research for Equity (CARE) teams are created in order to look at culturally relevant instructional practice and pedagogy in individual classrooms within the 12 Beacon Schools	Beacon School CARE teams will have applied a lens of equity to their classroom instruction & pedagogy, and have shared their learnings school-wide	CARE Teams are identified and have participated in two Equity-based seminars focused on culturally relevant instructional practice & pedagogy	Carla Randall & Regional Administrators	Carla Randall
D1	Increase the capacity in school leaders and central support staff to implement culturally responsive positive behavior support systems in the Academic Priority Zone Schools	(1) Provide targeted supports to schools with high rates of exclusionary discipline and over-representation	Capacity is built within first cohort of schools to implement PBIS and evidenced-based classroom management strategies	School Instruction Specialists are hired with a racial lens to support PBIS implementation and evidenced-based classroom management strategies	Melissa Goff & Tammy Jackson	Carla Randall



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D2	Special Education administrators will engage in seminars & coaching with a consultant from Pacific Educational Group to establish a new focus on instruction with a racial equity lens and integration with teaching and learning rather than compliance.	(1) Special Education Staff and Regional Administrators participate in professional development together and form teams to support schools	SPED Program Administrators and Regional Administrators establish a team approach to support schools to improve services to students with disabilities	SPED Administrators engage in 6 days of Professional development with Pacific Educational Group Consultant. Regional Administrators and Special Education Program Administrators teamed with Teaching and Learning and ESL administrators to design an action plan for addressing SPED instructional issues for 2 schools	Carla Randall & Robert Ford	Carla Randall
D3	Each school will include an equity plan with their School Improvement Plan (SIP)	(1) Regional Administrators work with their schools to develop equity plans with their School Improvement Plans	Equity plans are implemented	First drafts of School Improvement Plans provided to Regional Administrators and schools are provided feedback on their equity plans	Toni Hunter & Regional Administrators	Carla Randall
D4	Work with community partners around discipline data at specific schools to provide supports for students of color	(1) Develop a process to collaborate with CEP	Process with CEP has lead to reduction in over-representation of students of color in 10 identified schools	First quarter of discipline data is reviewed by staff in preparation for meeting with CEP	Melissa Goff & Tammy Jackson	Carla Randall
E1	Every staff member engages in the Courageous Conversations work in a differentiated model	See C5, C6, C7	See C5, C6, C7	See C5, C6, C7	See C5, C6, C7	See C5, C6, C7

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E2	School administrators, central instructional administrators and central office leadership engage in monthly equity professional learning communities (PLCs)	(1) Operational support leadership participate in Courageous Conversations about Race seminars and establish departmental equity teams	Operational support leadership will display increased capacity and confidence to engage their staff in courageous conversations about race, and equity teams will be established to lead monthly departmental training sessions	Leadership will have attended two Courageous Conversations about Race seminars and identified equity team members	Carla Randall & Lorenzo Poe	Carla Randall & Lorenzo Poe
F1	Develop and implement a framework for equitable, transparent & consistent stakeholder engagement which clarifies roles & responsibilities and reduces barriers to participation for underserved communities	(1) Develop stakeholder engagement framework	PPS stakeholder engagement is more transparent, consistent and effective, as measured by established qualitative and quantitative methods	The stakeholder engagement framework is in place and is being used to organize key community engagement initiatives	Robb Cowie	Zeke Smith
		(2) Implement and evaluate framework on a pilot basis	Regular evaluation of framework as it is applied to different initiatives. Evaluations shared with User Group and available online.	Convene "User Group" to apply framework, identify additional processes in which to test it (including budget, bond and strategic plan) and develop overall evaluation measures		
		(3) Develop easy-to-use online tools to facilitate application of framework by departments and schools	Online tools and video training are finalized. User Group supports use of framework by PPS staff.	Draft tool incorporates equity lens		
		(4) Institutionalize use of framework	Policy and administrative directive adopted			

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**PPS Racial Equity Plan**  
**2011-2012 Annual Work Plan Update**

	Strategy	2011-2012 Actions	Year-End Intended Outcome	Jan 2012 Progress Indicator(s)	Owner	Sponsor
F2	All schools will develop and execute a parent engagement plan as part of their School Improvement Plan (SIP Plan) that includes culturally-specific strategies for their neighborhoods and partners, focusing on connecting parents to the instructional goals of their school	(1) Pilot schools develop action plans for partnership that inform development of culturally responsive strategies for use in SIPs	All PPS schools have family engagement plans that show evidence of effective and culturally responsive practices	Pilot schools form Action Teams for Partnership to develop culturally responsive family engagement strategies	Reiko Williams	Carla Randall & Zeke Smith
(2) Provide professional development in culturally responsive family engagement practices for principals and teachers		Provide training to school staff and leadership regarding family culture including issues pertaining to language and race	Provide professional development to principals on culturally responsive family engagement practices. Work with PPS Professional Development Advisory Council (PDAC) to develop training options for teachers regarding Family Engagement	Reiko Williams		
(3) Develop tools to support evaluation and improvement of family engagement components of SIPs		Rubric is used to evaluate SIPs		Reiko Williams		
F3	The ESL department will use the guidelines of Title III to establish supplemental supports to better engage families of ESL students	(1) Deliver & train CA resource across the district to meet the requirements of the OCR VRA for SpEd/ELL	100% of ELL parents strategically targeted for learning and engagement opportunities at the school level	Review current PPS efforts and identify gaps in district- and school-based opportunities for Title III families. Develop strategy and sample opportunities for Title III families and identify HR resources and job specifications	Ewa Chomka-Campbell	Carla Randall
(2) Support current school and district family engagement opportunities and identify gaps at the school level K-12						

**Appendix B**  
**PPS Racial Equity Plan**  
**2011-2012 Annual Work Plan Update**

	Strategy	2011-2012 Actions	Year-End Intended Outcome	Jan 2012 Progress Indicator(s)	Owner	Sponsor
F3	The ESL department will use the guidelines of Title III to establish supplemental supports to better engage families of ESL students	(3) Identify fiscal and program resources to support supplemental opportunities for parents and communities at the school and district level  (4) Identify and develop a responsive human resource structure based on school need	100% of ELL parents strategically targeted for learning and engagement opportunities at the school level	Review current PPS efforts and identify gaps in district- and school-based opportunities for Title III families. Develop strategy and sample opportunities for Title III families and identify HR resources and job specifications	Ewa Chomka-Campbell	Carla Randall
F4	Facilitate parent/family trainings with targeted outreach to underserved families	(1) Develop Parent Academy content in collaboration with families, staff, and community providers	Parent Academy program in place for 2012-2013 school year. Trainings designed to provide culturally responsive, Milestones-related programs to 400 parents during 2012-2013 school year	Winter-Spring Parent Academy training schedule is finalized. Trainings reflect cultural responsiveness and strong connection to Milestones	Reiko Williams	Zeke Smith



## PORTLAND PUBLIC SCHOOLS

P.O. Box 3107 / Portland, Oregon 97208-3107

Telephone: (503) 916-3741 • FAX: (503) 916-2724

### INFORMATIONAL REPORT TO THE BOARD

**TITLE: ONLINE LEARNING**

**Study Session Meeting Date:** January 9, 2011 **Executive Committee Lead:** Carla Randall,  
Sue Ann Higgins

**Department:** Education Options **Staff Lead:** Marcia Arganbright

**District Priorities:** Individual Student Supports  
Equitable Access to Rigorous Common Core Program

#### I. BACKGROUND

For the past four years, online learning at Portland Public Schools has focused on credit recovery as a strategy to meet the **10<sup>th</sup> grade milestone** (on track to graduate) and to raise **graduation rates**. Online learning provided students with the opportunity to successfully complete over 1,000 courses in the 2010-11 school year using the online curriculum, PLATO. This year, we have expanded our support for credit recovery and already have students enrolled in over 800 courses. Of all course failures 24% were Black students while the African American population in PPS is only 12%. Online credit recovery is an **equity** strategy to close the achievement gap.

In addition to PLATO, Northwest Regional Education Service District (NWRESA) is providing online courses through **Oregon Virtual Education (ORVED)** at [www.orved.org](http://www.orved.org) to districts either as digital content to be used by a local teacher or as a course taught by an ORVED highly qualified teacher. The cost to a district is \$100 per student per course for content or \$195 for a semester course with a teacher. PPS is using this option in a limited number of situations this year.

Looking forward, online learning can provide a number of different opportunities for students at PPS through **blended learning**: combining face to face and digital learning that enhance and customize the classroom experience through the use of information and communication technology. Blended learning can take a number of different forms from students taking entire courses online with certified teachers to the use of digital tools in the classroom to provide differentiated supports.

The attached documents present a number of tiered options for expanding online learning. They are in priority order based on the district milestones for 10<sup>th</sup> grade on-track and high school graduation.

- Tier 1) Expanded course recovery with additional costs for highly qualified teachers and hardware for staff and students.
- Tier 2) Meeting special population needs such as teen parents and students on home instruction. Could include district approved needs for acceleration (middle level math, advanced HS courses) to maximize staff for small numbers t individual schools. Includes original credit in addition to credit recovery.
- Tier 3) Customized learning for proficiency-based credit and content recovery
- Tier 4) District-sponsored virtual school
- Tier 5) Supplemental model with full staffing to provide original courses for students who want to take more than 7 courses per year

## II. CURRENT WORK RELATED TO THIS ITEM:

### ***Professional Development:***

With the support of the Director of Learning Options and technical assistant, teachers who are supervising students taking PLATO credit recovery have learned how to use the tools available in the system to track learning to support students. In November, **expert trainers from PLATO** were in Portland to meet individually with every PLATO teacher and provide one-on-one professional development. As a part of the PLATO system every teacher in PPS can have access to digital learning tools, and some teachers received specialized training on how to access those tools.

### ***Proficiency-Based Credit Recovery:***

As a part of the Voluntary Public School Choice grant, we will implement a **pilot project** second semester in four schools (Benson, Franklin, Jefferson, and Roosevelt). The pilot will create and test the Tier Three option of credit recovery based on proficiency using online resources. We will seek out staff who is willing to be pioneers in creating this new option for students. Support will be provided to teachers who want to build out their courses to online courses using the Oregon Virtual School District tool, **Moodle** (ORVSD at [www.orvsd.org](http://www.orvsd.org) ). The Director of High Schools, Director of Learning Options, and high school administrators are collaborating on this pilot.

## IV. FISCAL IMPACT:

See attached proposed tiered plan and budget.

## V. NEXT STEPS FOR STAFF:

In addition to exploring the enhanced tiered options, staff is currently engaged in discussions around the following:

- 1) **ORVSD** (Oregon Virtual School District at [www.orvsd.org](http://www.orvsd.org) ) is very interested in collaborating more actively with Portland and with Hillsboro and Beaverton. The Director of Learning Options has had several collaborative meetings with ORVSD and Hillsboro to determine what might be purchased through ORVSD to benefit the most students. Currently there is a great deal of digital content available to all teachers at the ORVSD web site, and we will continue to build awareness.
- 2) As a district we are looking to adopt a quality **system of digital materials** for use beginning in Summer 2012. This work is being done in a collaborative project with IT, EdBox, Teaching and Learning, and High Schools. Hillsboro School District is working closely with PPS because of the potential for collaborative purchasing, professional development, and policy development. Learning Options has been in conversation with various vendors, and we look to purchase in the spring.
- 3) We know from national research that most students need adult support to successfully complete their online courses. By Fall of 2012, PPS must provide a **highly qualified teacher** to oversee all virtual coursework. Learning Options staff is preparing for implementation of this requirement. Five high schools are already staffing 12 online credit recovery sections with school-based FTE.

#### **VIII. TIMELINE FOR IMPLEMENTATION/EVALUATION**

##### **Based on implementation of tiered options:**

Winter 2012	Present budget for online learning plan
Winter 2012	Pilot online curriculum and get feedback from teachers and students
Winter 2012	Begin pilot for proficiency credit with online tools
Winter 2012	Send out request to vendors for online learning curriculum proposals
Spring 2012	Determine what classes to teach online in Fall 2012
Spring 2012	Contract for online curriculum for 2012-13
Spring 2012	Staff online learning program and classes
Summer 2012	Use online curriculum for summer programs
Fall 2012	Enroll appropriate students in PPS full day Virtual School
Fall 2012	Selected courses use online curriculum at high schools
Fall 2012	Virtual School staff provides online instruction meeting needs of various populations.

## ONLINE LEARNING HISTORY AND CURRENT STATUS

ENROLLMENT		
	2010-11	2011-12 (as of 12/19/11)
Number of online students	1554	408
Number of semester courses	2657	845
Number of successful course completions	1179 (45%)	118
Semester courses failures (approx.)	8004 (2009-10)	6837 (2010-11)

BUDGET			
	2010-11		2011-12
PLATO online learning curriculum	Title I	57,291	
	Special Ed	35,000	
	Grant	38,509	
	EdOptions	50,760	78,900
		<b>\$181,291</b>	<b>\$78,900</b>

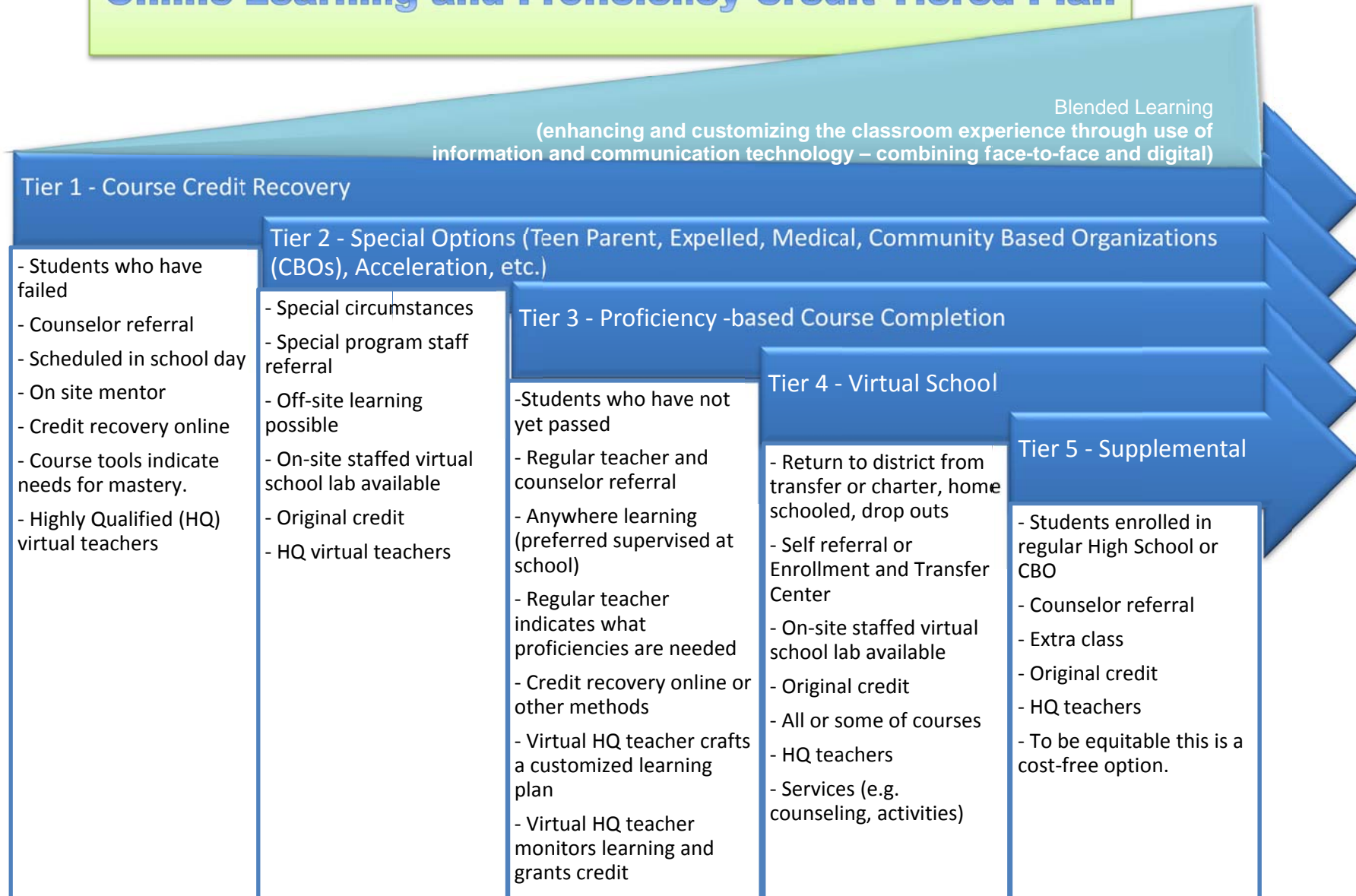
STAFFING		
	2010-11	2011-12
Administrator	1.0	1.0
Tech. Assistant	1.0	1.0
Teachers	(Unsure. This was a school based decision)	(There are 12 sections staffed by teachers from school level FTE)

COSTS FOR LEARNING OPTIONS*	2010-11	2011-12
administrator salary and benefits	\$147,371	\$144,800
tech. assistant	\$45,113	\$43,931
learning management system and curriculum	\$181,291	\$78,900
conference/ travel	\$1,772	\$1,980
hardware	\$1,865	0
supplies	\$313	350
phone	\$ 0	\$ 360
mileage	\$ 152	\$ 750
<b>Total</b>	<b>\$377,877.00</b>	<b>\$271,071.00</b>

\*Some costs included in general Ed Options budget



# Online Learning and Proficiency Credit Tiered Plan



### ONLINE LEARNING - ASSUMPTIONS FOR BUDGET PLANNING

	Tier 1		Tier 2		Tier 3		Tier 4		Tier 5	
	Course Credit Recovery		Emergency / Special Options		Proficiency Content / Present Time Credit Recovery		Return to District Full Time		Original Credit Supplemental	
<b>Current Status</b>										
Potential Population Numbers	6837 failed sem. courses (2010-11)		109 expelled students 32 SpEd. home instr. DART 6 Teen Parents Acceleration		6837 failed sem. courses (2010-11)		552 drop outs 100 Reconnection Center 65 HS transferred out 100 HS in online charters 514 HS home schooled 326 MS home schooled 233 elem home schooled		2591 students are taking 6 courses or less in HS (1264 seniors, 745 juniors, 354 sophomores, 228 freshmen)	
<b>Expansion or Restructuring</b>										
Targeted number of course slots per year	900		80		1300		2660		2000	
Rationale	Less than this year because of other options and more focused target		50% of students (160) = 80 x 1/4 year x 4 courses		20 % of course failures		20% of targeted HS students x 10 sem. courses		One sem course for each junior and senior	
<b>Needed Resources</b>										
	2011-12	2012-13								
Director	1.0 FTE	1.0 FTE	1.0 FTE		1.0 FTE		1.0 FTE		1.0 FTE	
Tech Assistant	1.0 FTE	1.0 FTE	1.0 FTE		1.0 FTE		1.0 FTE		1.0 FTE	
Teacher (1 FTE = 30 students x 12 sections = 360)		2.5 FTE	1.0 FTE		3.5 FTE		7.0 FTE		5.0 FTE	
Limited Term		x	x		x		x		x	
Secretary			.5 FTE		.5 FTE		1.0 FTE		1.0 FTE	
Professional Development		x	x		x		x		x	
Curriculum Development		x	x		X		x			
Instructional Assistants @ HS		x			x				X	
Online Curriculum	x	x	x		x		x		x	
Learning Management System		x	x		x		x		x	
Office operational needs		x	x		x		x		x	
Computers			x				x			

### TIERED BUDGET FOR ONLINE AND PROFICIENCY LEARNING

This chart shows the cost for each Tier beyond the cost of Tier 1. Each Tier calculation is independent of the others.

COSTS FOR LEARNING OPTIONS	2010-11	2011-12	Tier 1	Tier 2	Tier 3	Tier 4	Tier 5	
director salary and benefits	\$147,371	\$144,800	\$146,248					Based on current staff w/ 1% incr
Tech. assistant	\$45,113	\$43,931	\$44,370					Based on current staff w/ 1% incr
Summer contract for tech asst.			\$4,437					20 days
Secretary			\$ -	\$ 25,000	\$ 25,000	\$ 50,000	\$50,000	Estimate
learning management system and curriculum	\$181,291	\$78,900	\$ 90,000	\$ 8,000	\$ 130,000	\$ 266,000	\$200,000	\$100 per course
curriculum development and review time			\$ 2,100		\$ 2,800	\$ 4,900	\$ 3,500	2 days per teacher
teacher salary and benefits			\$ 232,500	\$ 93,000	\$ 325,500	\$ 651,000	\$ 465,000	Based on \$93,000 average
Limited term			\$ 45,000			\$ 45,000	\$ 45,000	for adjunct staff
professional development			\$ 3,500		\$ 4,900	\$ 9,800	\$ 7,000	2 days per teacher
conference/ travel	\$1,772	\$1,920	\$ 10,000					4 staff to one conference
contracted PD provider			\$ 5,000					\$1000/ day + expenses
hardware for staff			\$ 2,500	\$ 2,500	\$ 2,000	\$ 3,500	\$ 2,500	\$500 per device
hardware for students	\$1,865		\$ 2,500	\$ 10,000	\$ 10,000	\$ 20,000	\$ 20,000	\$500 per device

digital equip (printer, projector)			\$ -	\$ 5,000	\$ 5,000	\$ 5,000	\$ 5,000	
supplies	\$313	\$360	\$ 1,000		\$ 1,000	\$ 1,000	\$ 1,000	
Phone	\$ -	\$ 360	\$ 2,160	\$ 1,440	\$ 2,520	\$ 3,960	\$ 2,160	\$30/month per staff
Membership			\$ 300					
mileage	\$ 152	\$ 260	\$ 2,160	\$ 1,440	\$ 2,520	\$ 3,960	\$ 2,160	\$30 / month / staff
<b>Total</b>	<b>\$ 377,877</b>	<b>\$ 270,531</b>	<b>\$ 593,775</b>	<b>\$ 146,380</b>	<b>\$ 511,240</b>	<b>\$ 1,064,120</b>	<b>\$ 803,320</b>	
(add Tier 1 cost)				\$ 593,775	\$ 593,775	\$ 593,775	\$ 593,775	
Total Cost for Each Tier			<b>\$ 593,775</b>	<b>\$ 740,155</b>	<b>\$ 1,105,015</b>	<b>\$ 1,657,895</b>	<b>\$ 1,397,095</b>	
<i>IT support</i>			\$ 15,000					<i>In Kind District support</i>
<i>financial support services</i>			\$ 15,000					<i>In Kind District Support</i>

Highlighted costs in Tier 1 are above current program

The above costs might be offset by potential savings, efficiencies, reallocations, or revenue. To estimate these benefits is difficult. On the following pages are assumptions that show one picture of possible benefits.

**Potentially we might find \$444,000 in cost shifts or efficiencies and over \$1.5 million in revenues.**

**BACKGROUND INFORMATION AND ASSUMPTIONS**

<b>2010-11 Plato Contract was funded:</b>		
Title I	\$	57,291
Special Ed	\$	35,000
Grant	\$	38,509
EdOptions	\$	50,760
	<b>\$</b>	<b>181,560</b>

<b>2011-12 PLATO Contract was funded</b>		
EdOptions	\$	78,900
	<b>\$</b>	<b>78,900</b>

<b>Assumptions</b>		
Teacher Av. Salary and benefits 2013	\$	93,000
30:1 Student/Teacher Ratio		
Full FTE is 180 students/sem. 360/year		
Cost per student (salary / 360 students)	\$	250
Teachers have 2 additional PD days		at \$50/hr
Teachers have 5 curriculum dev. days		at \$50/hr
5 people each year to iNACOL		at \$2000

**Needed Staffing at School Sites**

In the current year (11-12) there are 12 sections of credit recovery staffed with licensed teachers at PPS HSs. In the models presented schools would not have to provide licensed staff, but would need to provide supervised labs for students to work and take tests. This could be done with classified staff. Nationally there are various kinds of staffing and compensation models used for virtual teachers and these could be explored. These models assume compensation similar to face-to-face instruction.

**POTENTIAL REVENUE GENERATION OR COST SHIFTING OR SAVINGS  
ONLINE LEARNING AND PROFICIENCY CREDIT**

*We can look to online learning to serve students who are being served in other ways now. Implementation might mean an efficiency in the way we currently fund schooling, and in some ways may provide new revenue to the district. To predict any cost saving is difficult not knowing how many students or teachers might take advantage of the strategy. Currently we cover costs for credit recovery, repeating courses, acceleration, special needs, and differentiation through many different resources. The only way to generate revenue from online learning is to bring students back to PPS who are not enrolled. The cost of a teacher is the same whether online or face to face. Curriculum and the system that gives us data is not free. Below are possible shifts and revenue and the assumptions they were built on.*

	<b>cost shift</b>	<b>revenue</b>
<b>Tier 1 Course Credit Recovery</b> If students stay in school, they generate ADM. It is unknown how many students stay in school or ultimately graduate because of credit recovery	unknown	unknown
<b>Tier 2 Special Options</b> Students with special circumstances currently may receive instruction at home with a requirement of 5 hours of teacher time a week. Teachers and substitutes serve these students. How they are paid varies. We might figure that an online teacher could serve some of these students. If we figure that a teacher is being paid \$200/ week for teaching a homebound student and instead we served 20 students a week with an online teacher, we could save some of the costs of \$4000 a week or \$120,000 a year. By having a virtual teacher serve 5 K-8 schools with a total of 30 students taking Geometry, we could save .8 FTE (\$74,400) Currently funded through Special Ed. and Student Services and TAG	194,400	
<b>Tier 3 Proficiency-based Course Completion</b> Instead of paying teachers to teach a full course students may be able to demonstrate proficiency in less time. How long it takes to demonstrate proficiency will vary so it is difficult to predict efficiencies. If 25% of course failures (2000) are made up with this option and a student completes the proficiencies in half the time, and it costs \$250 to teach a full course, then there could be a savings compared to retaking a course.	250,000	
<b>Tier 4 Virtual School</b> If we would reenroll 20% of 1331 potential students not in our schools and get \$5700 ADM we could generate revenue to fund online learning. Students would have to enroll for 1/2 time or more.		1,516,200
<b>Tier 5 Supplemental</b> There could be costs savings to families instead of evening schloars, private online schools, summer school	unknown	none
<b>POTENTIAL SAVINGS or SHIFT</b>	<b>444,400</b>	<b>1,516,200</b>

## Background Information

### Online Learning for Portland Public School Students

### Fall 2011

#### **There Are Needs That Could be Met by Online Learning in Portland**

1. Credit and content recovery:
  - Give High School students opportunity to recover credits
  - Provide a tool to teachers who are using credit for proficiency
2. Personalization:
  - Give students choice of online or face-to-face learning
  - Provide tools for teachers and students to communicate and learn 24/7
  - Address community demand for customization of learning
3. Serve a broad base of students, not currently enrolled:
  - Provide a quality personalized education to entice students back to the Provide another option for students who have dropped out
  - Engage home schooled students and families
4. Supplement curriculum:
  - Give teachers tools to supplement their face-to-face class (blended learning)
  - Provide Tier 2 and 3 supports and differentiation
  - Provide options to advance learning
5. 21<sup>st</sup> Century Readiness:
  - Prepare for college courses
  - Teach skills for workplace learning
  - Use life skills
6. Professional Development:
  - Provide convenient/ cost effective support for teachers
  - Create collaborative tools for teachers
7. Keep up with the rest of the nation:
  - Increase number of students learning online
  - Increase number of teachers using digital media

#### **Data and Examples:**

- **Credit and content recovery:**

In 2010-11 in PPS high schools there were 6837 semester course failures in 20 courses. 41% of all students have less than 6 credits starting their 10<sup>th</sup> grade year.

The courses that PPS students fail the most are:

- Biology (808)
- Geometry (676)
- Modern World History (660)
- Algebra I (600)
- Language Arts 10 (568)
- Language Arts 9 (538)
- Foundations of Physics and Chemistry (497)

- **Personalization:**
  - Students want and learn best with lots of interaction with a teacher. (see *Innovative Educator*)<sup>1</sup>
- **Serve a broad base of students, not currently enrolled:**
  - There are 1004 students registered as home schooled in the PPS area. Even if 25% of them registered for a half time online program we could bring in \$1,433,550 more state funding.
  - Oregon Virtual Academy has 61 PPS students K-12 (12 in HS and 8 in MS)
  - Oregon Connections Academy has 75 PPS students K-12 (31 in HS and 17 in MS) At \$5700 per student that is \$775,200 of state funding going to other online schools.
- **Supplement curriculum:**
  - There are students who are not meeting state standards
    - 21% in reading/lit 32% in math 36% in science 33% in writing
  - Many PPS high school students have one or two periods a day that they are not enrolled in a class. 2591 students are taking 6 courses or less.
  - As of December 15, there are 408 students enrolled in 840 PLATO courses for credit recovery.
  - Every PPS high school or middle school cannot have every course a student wants or needs. Schools could combine students virtually and have a full class. A student at a school across the city could join a face-to-face class with online tools.
- **21<sup>st</sup> Century Readiness:**
  - About 10% of higher education students took at least one online class in 2003, and half of all postsecondary students will take at least one class online by 2014.<sup>2</sup>
- **Professional Development and Teacher Collaboration**
  - SIOP Team and elementary math team have used online PD with staff
  - WebEx is used in a variety of instances for meetings
- **Keep up with the rest of the nation:**
  - Nationally online learning in K-12 schools is growing.
    - In 2000 45,000 K-12 students took an online course, and by 2010 over 4 million were participating in some kind of formal online learning program.
    - By 2019 50% of high school courses will be online<sup>3</sup>
  - Currently about 3% of PPS high school students are enrolled in online credit recovery.

**Online learning could meet several needs of students and teachers in Portland Public Schools**

<sup>1</sup> <http://theinnovativeeducator.blogspot.com/2011/11/five-things-students-want-their.html> The Innovative Educator, Lisa Nielsen. Nov. 15, 2011

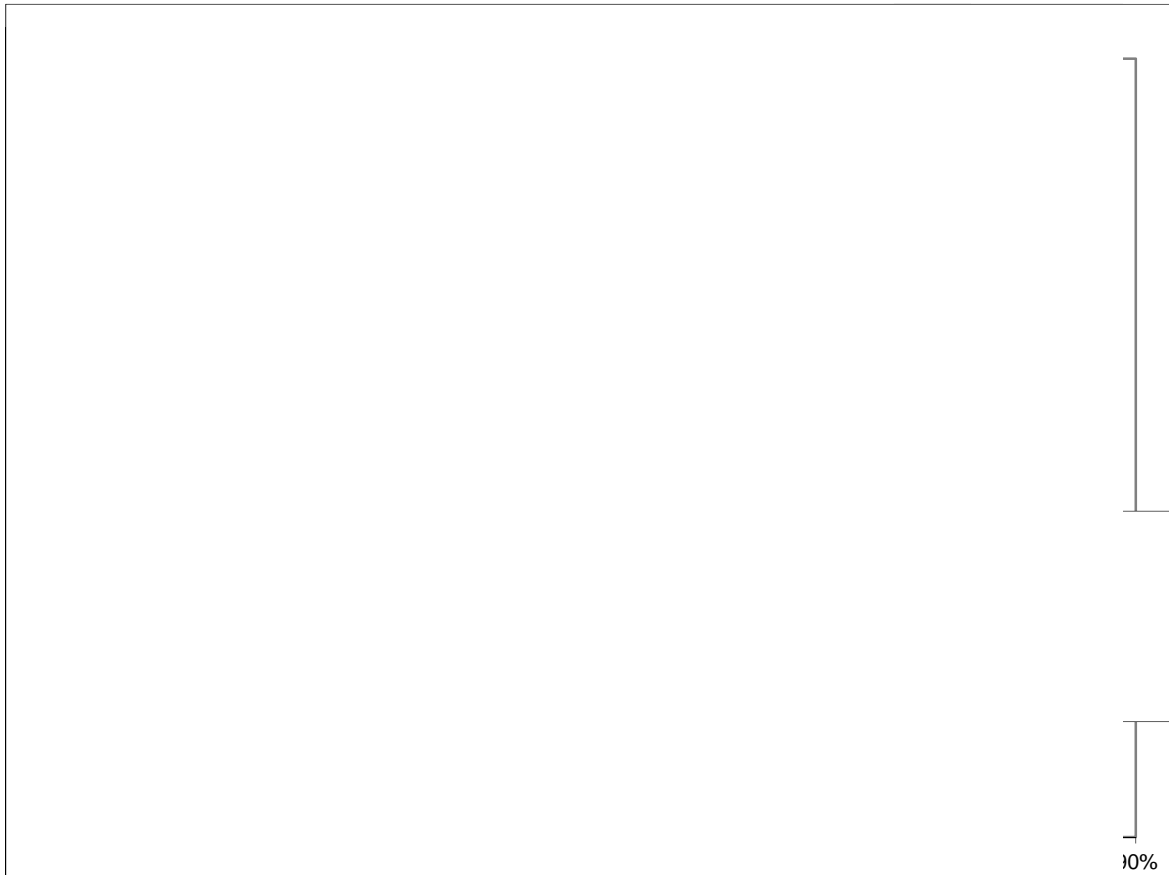
<sup>2</sup> Clayton M. Christensen, Michael B. Horn and Curtis W. Johnson, *Disrupting Class: How Disruptive Innovation Will Change the Way the World Learns*, (New York: McGraw-Hill, 2008), 91

<sup>3</sup> Clayton M. Christensen, Michael B. Horn and Curtis W. Johnson, *Disrupting Class: How Disruptive Innovation Will Change the Way the World Learns*, (New York: McGraw-Hill, 2008), 98



## What Are Students Saying Nationally?

- 38% of students who have not taken an online course **are interested in doing so**
- 63% of students identify online learning as a **must-have component** in their “ultimate school”
- Over 40% of students are currently communicating with their **teachers** electronically and over 70% of students are **communicating with friends and family** through text, email, and Instant Messaging (IM)
- Over 70% of high school **students have access** to a computer and 67% have access to a cell phone IM
- Over 70% of high school **students have access** to a computer and 67% have access to a cell phone<sup>4</sup>



**Technology is a daily part of students’ lives and should be integrated into their school lives.**

<sup>4</sup> Speak Up2009: Creating Our Future: Students Speak Up about Their Vision for 21<sup>st</sup> Century Learning. [www.tomorrow.org/speakup](http://www.tomorrow.org/speakup)

## Student Voice

At the recent iNACOL Virtual Schools Symposium (Nov. 2011) high school students who have experience learning online as well as teachers who have experience with these students shared some advice for making this type of learning even better.

### 1. Socialization is important

Teenagers value the ability to socialize and they don't want to lose that online. Provide opportunities for students to meet, get to know each other, work together, and connect deeply in your online classes. Teens want you to make it fun for them. While they certainly enjoy the benefits of working independently, they appreciate opportunities to work in pairs, groups, and with other class members. Help foster this by creating projects and online spaces for them to work this way.

### 2. Students Want to See Each Other

Students want to have a chance to get to know their classmates just as they can in a face-to-face environment. This means seeing one another so they can put a name and a personality with a face.

### 3. Students Want to See Their Teacher

Students want to get to know who their teacher is. Seeing them helps. They appreciate the ability to see their teacher speaking to them.

### 4. Students Want You to Know Them

It is important to online students that you know who they are. Provide opportunities in their work for them to include something personal. This might be pictures of them and their life or thoughts from members of their family or community. Set up times where you can engage in one-on-one chats. Reach out to your students via text to help make a personal connection using a tool they love.<sup>5</sup>

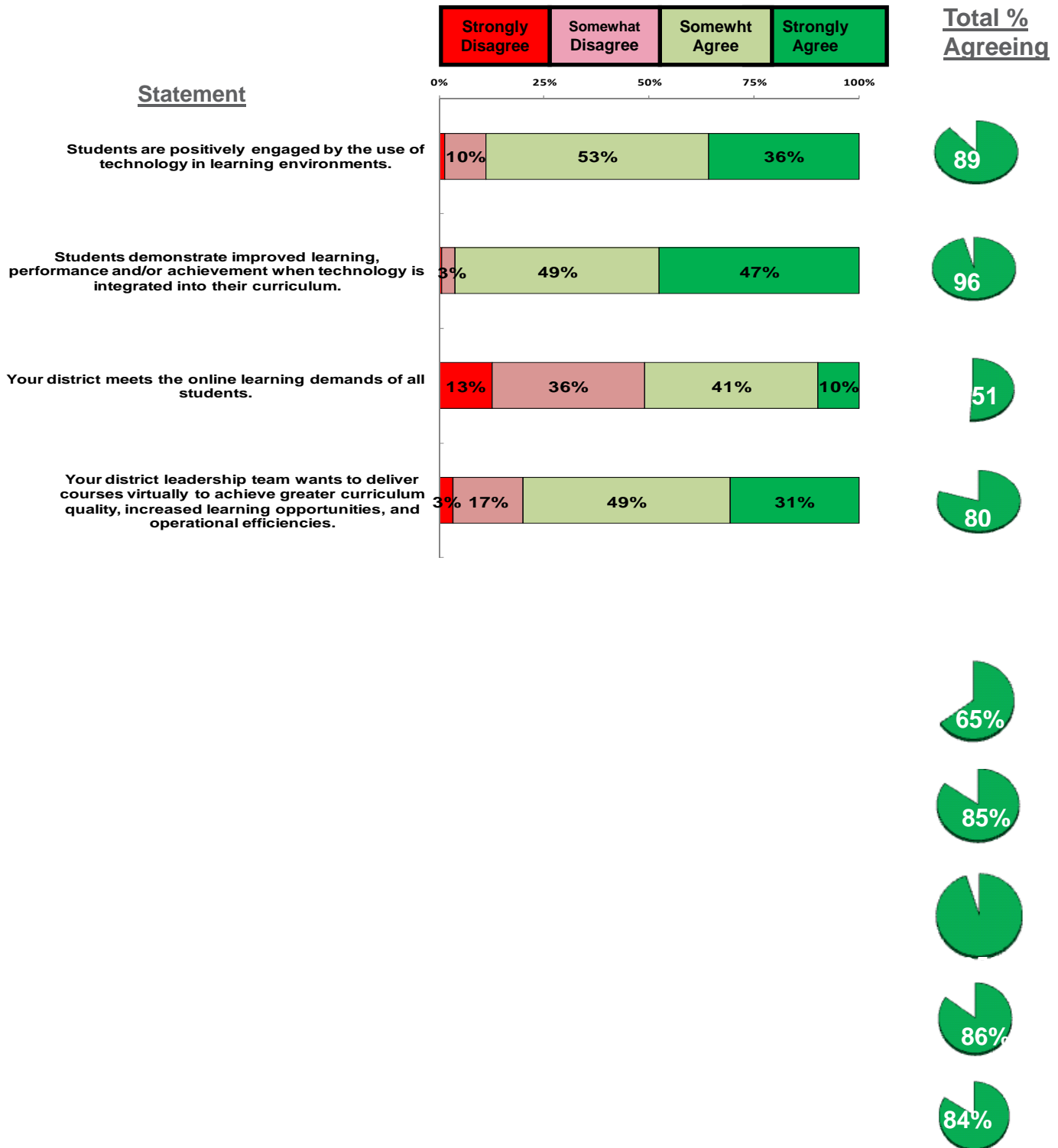
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<sup>5</sup> <http://theinnovativeeducator.blogspot.com/2011/11/five-things-students-want-their.html> The Innovative

Educator, Lisa Nielsen. Nov. 15, 2011

1/4/2012

## District Administrator Perspectives <sup>6</sup>



<sup>6</sup> Blackboard Education Week Survey of Online Learning Preparedness (2010 n+1962)

## Various Online School Models

**Full time and fully online** – Students take all courses online. Teachers and students communicate electronically via online chat, online whiteboard, skype, telephone, etc.

**Full time and fully online with a face-to-face component** – Same as above, but there is an intentional and expected way for students and teachers to interact face-to-face. The school may have a common workspace or teachers and students may arrange meeting in convenient public spaces.

**Online school with part time bricks and mortar** – Students participate in online classes and take 1-3 classes at their local school. For example, a student might take core online and choir and PE at school.

**Full time public school with online course supplement** – Students are enrolled in regular district school and take an extra class for credit recovery or acceleration

**Full time public school with combination of online and face-to-face courses** – Students are enrolled in regular district school and take the number of classes considered full time some classes are online and some face-to-face (and some may be blended).

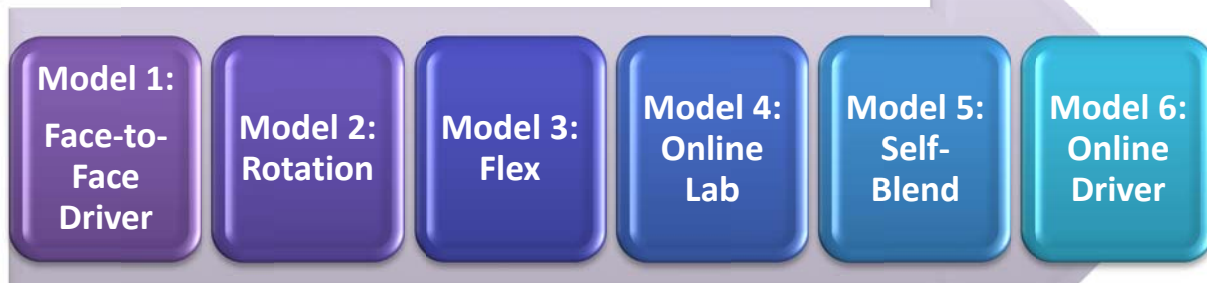
## What is Blended Learning? A definition

The integration of face-to-face and online learning to help enhance the classroom experience and extend learning through the innovative use of information and communications technology. Blended strategies enhance student engagement and learning through online activities to the course curriculum, and improve effectiveness and efficiencies by reducing lecture time.

“A course that blends online and face-to-face delivery. Substantial proportion of the content is delivered online, typically uses online discussions, and typically has some face-to-face meetings.” The Sloan Consortium defines blended courses as having between 30 percent and 79 percent of their content delivered online, with the remaining portion of the course content delivered by face-to-face instruction or other non web-based methods, such as paper textbooks.<sup>7</sup>

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<sup>7</sup> **Blending Learning: The Convergence of Online and Face-to-Face Education** Written by John Watson, Evergreen Consulting Associates PROMISING PRACTICES IN ONLINE LEARNING®  
1/4/2012 Report to Portland Public Schools Board



## Models of Bended Learning

### Model 1: Face-to-Face Driver

The programs that fit in the face-to-face-driver category all retain face-to-face teachers to deliver most of their curricula. The physical teacher deploys online learning on a case-by-case basis to supplement or remediate, often in the back of the classroom or in a technology lab.

### Model 2: Rotation

The common feature in the rotation model is that, within a given course, students rotate on a fixed schedule between learning online in a one-to-one, self-paced environment and sitting in a classroom with a traditional face-to-face teacher. It is the model most in between the traditional face-to-face classroom and online learning because it involves a split between the two and, in some cases, between remote and onsite. The face-to-face teacher usually oversees the online work.

### Model 3: Flex

Programs with a flex model feature an online platform that delivers most of the curricula. Teachers provide on-site support on a flexible and adaptive as-needed basis through in-person tutoring sessions and small group sessions. Many dropout-recovery and credit-recovery blended programs fit into this model.

### Model 4: Online Lab

The online-lab model characterizes programs that rely on an online platform to deliver the entire course but in a brick-and-mortar lab environment. Usually these programs provide online teachers. Paraprofessionals supervise, but offer little content expertise. Often students that participate in an online-lab program also take traditional courses and have typical block schedules.

### Model 5: Self-Blend

The nearly ubiquitous version of blended learning among American high school students is the self-blend model, which encompasses any time students choose to take one or more courses online to supplement their traditional school's catalog. The online learning is always remote, which distinguishes it from the online-lab model, but the traditional learning is in a brick-and-mortar school. All supplemental online schools that offer a la carte courses to individual students facilitate self-blending.

### Model 6: Online Driver

The online-driver model involves an online platform and teacher that deliver all curricula. Students work remotely for the most part. Face-to-face check-ins are sometimes optional and other times required. Some of these programs offer brick-and mortar components as well, such as extracurricular activities.<sup>8</sup>

<sup>8</sup> **The Rise of K–12 Blended Learning** *Profiles of emerging models* By Heather Staker  
1/4/2012 Report to Portland Public Schools Board

## RESOURCES FOR INFORMATION ABOUT ONLINE AND BLENDED LEARNING

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<http://www.knewton.com/digital-education/>

***State of Digital Education Infographic***

Published by KNewton Infographics

[http://www.inacol.org/research/docs/national\\_report.pdf](http://www.inacol.org/research/docs/national_report.pdf)

***A National Primer on K-12 Online Learning***

Written by John Watson and published by iNACOL

<http://kpk12.com/>

***Keeping Pace with K-12 Online Learning (2011): A Review of Policy and Practice***

Written and published by Evergreen Education Group

[http://www.inacol.org/research/docs/iNACOL\\_Its\\_Not\\_A\\_Matter\\_of\\_Time\\_full\\_report.pdf](http://www.inacol.org/research/docs/iNACOL_Its_Not_A_Matter_of_Time_full_report.pdf)

***It's Not a Matter of Time: Highlights from the 2011 Competency-Based Learning Summit***

Written by Chris Sturgis (MetisNet), Susan Patrick (iNACOL) , and Linda Pittenger (Council of Chief State School Officers) and published by iNACOL and CCSSO

<http://www.inacol.org/research/reports.php>

**A website of a comprehensive list of reports and publications**

<http://www.inacol.org/research/bookstore/detail.php?id=21>

***Lessons Learned from Virtual Schools: Experiences and Recommendations from the Field***

Edited by Richard Ferdig (Kent State) and Cathy Cavanaugh (U of Florida) and published by iNACOL



## PORTLAND PUBLIC SCHOOLS

Mailing Address: P.O. Box 3107 / Portland, Oregon 97208-3107  
Telephone: (503) 916-2000 • FAX: (503) 916-2724

### Superintendent's Recommendation to the Board and Staff Report

Title: State School Fund School Year Subaccount

Board Meeting Date:  
January 9, 2012

District Priority: Stable Operating Model

Department: Finance

Executive Committee Lead: Neil Sullivan  
Staff Leads: Zhai Logan, Budget Director  
David Wynde, Deputy CFO

#### Issue Statement

As part of the state funding for the 2011-12 school year, the legislature included a School Year Subaccount of \$125 million. PPS allocation under this SYS is \$10,108,376.29. As a condition of this appropriation there is a requirement for each school district to report on the use of these funds.

#### Background

Every biennium the state legislature appropriates a sum of money for the State School Fund to support K-12 education delivered in schools districts and Education Service Districts across the state. These funds are divided between the two school years.

In addition to these funds, local revenue is generated by schools districts and ESDs via property taxes every year.

A relatively small amount of this total revenue is earmarked for specific uses: small high school grants, high cost disability grants, for example.

The remainder is allocated to school districts (95.5%), ESDs (4.5%) and the Office of Regional Education Services (0.25%).

The current estimate for the amount of this funding available to school districts for 2011-12 is set out in the attached memorandum to school district business managers.

This funding is then allocated to specific districts through a fairly complicated formula that starts with enrollment as measured by weighted Average Daily Membership (ADMw) but also includes factors related to number of special education and ESL/ELL students, poverty rates as measured by the census (not free or reduced price school lunch eligibility) teacher experience and several other variables.

The 2011-12 budget appropriation for school districts and ESDs is \$2,867,830,000, of which \$125,000,000 is allocated to the 2011-12 School Year Subaccount. PPS share of this funding, based

upon estimated factors for the SSF allocation formula, is \$10,108,376.29.

PPS budget for 2011-12 was focused on ensuring the ability to offer the defined core program for students at all levels – in the face of reduced state funding compared to the prior biennium.

The ability to do this was dependent upon passage of the new local option levy, which replaced and increased an existing levy. Fortunately the voters in PPS passed that levy in May 2011.

PPS was able to maintain the core program – albeit at a bare bones level – and to preserve a full school year, by making further reductions in central and school staffing. In addition, there were some one-time transfers of funds from other accounts and use of reserves to fill the funding gap.

The more than \$10 million received under the SYS is equivalent to 107 licensed FTE (\$94,407 average cost, fully loaded), or approximately twice as many classified staff.

The contingency for the local option not passing was to make further cuts to staffing in schools.

Applying consistent logic to the hypothetical absence of the SYS funding, PPS would have been forced to make similar cuts or to reconsider the ability to maintain the school year at the planned number of days. Most likely it would have required some combination of both licensed and classified positions. Many school districts in the metropolitan area and across the state were forced to cut days in 2011-12.

For purposes of this reporting requirement it is reasonable to say that the funds are equivalent to 107 licensed FTE and that the SYS funds allowed PPS to retain licensed and classified staff in schools equivalent to this licensed FTE number in 2011-12.

#### **Related Policies/Fiscal Impact**

It is important to note that the allocation of funds by the legislature in the current biennium and between the two school years is greater in the first year than the second. Traditionally the funds have been allocated 49% to the first year and 51% to the second year. This approach makes sense because costs are almost always increasing over time.

In 2011-13, with the SYS funds required to be spent in the first year, the relative allocation is 50.2%/49.8%. This is very likely to create more funding challenges in 2012-13 for districts all across the state.

#### **Community Engagement**

There has been no community engagement activity around this specific action: the reporting for SYS funds.

However, there was substantial community engagement associated with the development, approval and adoption of the budget for 2011-12 and the discussion of the local option levy and the budget impact of that funding or lack thereof.

The superintendent met regularly with representatives of all employees, the board held regular public meetings and discussions on key issues, the Citizen Budget Review Committee performed its usual outstanding work, the board acting as the budget committee held the required public hearings.



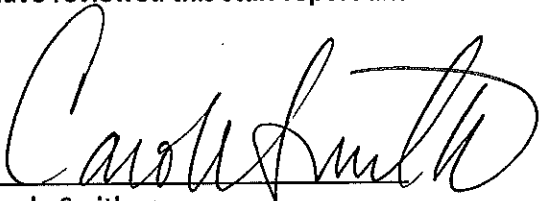
**Board Options**

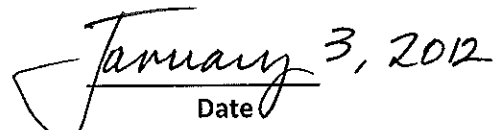
PPS is required to report on the use of the SYS funds. The form of that report is at the discretion of the board. A form of words for this report has been presented for the board's consideration.

**Staff Recommendation**

It is recommended that the Board approve the related resolution, attached, which confirms the use of the SYS funds.

I have reviewed this staff report and concur with the recommendation to the Board.

  
\_\_\_\_\_  
Carole Smith  
Superintendent  
Portland Public Schools

  
\_\_\_\_\_  
Date

**ATTACHMENTS**

1. 2011-12 State School Fund Estimates memorandum dated 10/27/11
2. PPS Resolution – Reporting the use of School Year Subaccount funds in 2011-12.

Date: 10/27/2011  
 To: District Business Managers  
 Re: 2011-12 State School Fund Estimates

2011-12*	2012-13	2011-13 Biennium
\$2,867,830,000	\$2,842,830,000	\$5,710,660,000
<b>2011-12 Budget Appropriation for school districts &amp; ESDs:</b>		<b>\$2,867,830,000</b>
	Less 2011-12 School Year Subaccount:	(\$125,000,000)
	Less Reserve Account:	(\$15,000,000)
	Less TAG, Speech Pathology and Virtual School Funding:	(\$1,042,000)
	Less Long Term Care and State Schools:	(\$12,000,000)
	Less Small High School Grants:	(\$2,500,000)
<b>Transfers/Deductions</b>		<b>(\$155,542,000)</b>
<b>State Revenue for Formula</b>		<b>\$2,712,288,000</b>
	District Local Revenue:	\$1,458,386,360
	ESD Local Revenue:	\$98,258,477
<b>Local Rev. for Formula (District + ESD)</b>		<b>\$1,556,644,837</b>
<b>Total Revenue For Formula</b>		<b>\$4,268,932,837</b>
	Office of Regional Education Services Share at 0.25%	\$10,672,332
	District Share at 95.50%	\$4,076,830,859
	ESD Share at 4.50%	\$192,101,978
<b>Other Transfers/Deductions:</b>		
	Less High Cost Disability Grants:	(\$18,000,000)
	Less Facility Grants:	(\$12,500,000)
	Less share of ORES	(\$10,192,077)
<b>Districts</b>		<b>(\$40,692,077)</b>
	Less ESD testing contract:	(\$484,000)
	Less share of ORES	(\$480,255)
<b>ESDs</b>		<b>(\$964,255)</b>
<b>Formula Revenue for Distribution</b>		
<b>School Districts</b>		<b>\$4,036,138,782</b>
<b>ESDs</b>		<b>\$191,137,723</b>

\*This State School Fund estimate is based on the \$5.733 billion budget. This estimate accounts for the increase in the Common School Fund disbursement, \$8.66 million for SB 453, and \$125 million for the 2011-12 School Year Subaccount. Only school districts are eligible to receive grant funding from the 2011-12 School Year Subaccount.

Sources for 2011-12 Estimates

ADMr:	Estimated
Property Taxes:	Estimated
Common School Fund:	Estimated
Federal Forest Fees:	Estimated
Other Local Revenues:	Estimated
Teacher Experience:	2009_10
11% Cap Waiver Basis:	2009_10
Poverty Basis:	2009_10
School District Funding Ratio:	1.2944722375430
Transportation Grant:	Estimated @ \$180,204,543
Estimated ADMr:	535,000
Estimated ADMw:	662,000
District Accrual per ADMw:	\$329
ESD Accrual per ADMw:	\$11
YCEP/JDEP amount per ADMw:	\$5,825

If you have questions, please contact Michael Elliott at Michael.S.Elliott@state.or.us



# PORTLAND PUBLIC SCHOOLS

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## SUPERINTENDENT'S RECOMMENDATION TO THE BOARD AND STAFF REPORT

**TITLE: 2011-12 BOUNDARY CHANGE AND GRADE RECONFIGURATION STAFF REPORT**

Board Committee Meeting Date:

District Priority: 6 & 8

Board Meeting Date: January 23, 2012

Executive Committee Lead: Carla  
Randall/Zeke Smith

Department: Office of Schools/Enrollment & Transfer

Staff Lead: Karl Logan/Judy Brennan

### I. ISSUE STATEMENT

*(Use this section to briefly explain the subject—2-3 sentences)*

Each year Portland Public Schools follows an enrollment data analysis process to identify schools outside of district target-size ranges. The priority schools for change this year all had enrollment change procedures that began last year. After considering numerous options to balance enrollment between these schools and consulting with stakeholders, staff supports a set of interrelated boundary and grade configuration changes to begin in September 2012.

### II. BACKGROUND

*(Include information related to the history of the item and any relevant timing issues)*

Enrollment balancing is a multi-year initiative to improve access to rigorous programs as well as to increase resource efficiency. Enrollment at about a third of schools at the K-5, K-8 or middle school level is either below program targets or above student capacity. The set of schools subject to change through this process is relatively small this year, with further activity expected in other quadrants of PPS in subsequent years.

Two major enrollment change processes began for schools in Northeast Portland last year:

- The Boundary Advisory Committee (BAC) process for Alameda, Beaumont, Sabin and ACCESS schools ran from November 2010-January 2011, convening a committee of parents from each school, as well as related neighborhood associations, to consider possible adjustments to provide enrollment relief for Alameda, reduce dependency on transfers at Beaumont, and increase and stabilize student population at Sabin while resolving location issues for ACCESS. The committee met several times and hosted a public forum to deliberate on options. It then selected a plan that prioritized a boundary change area between Alameda and Sabin and recommended a transfer preference for Grant cluster students to Beaumont and for Alameda students to Sabin. The process was criticized for moving too quickly with too little quality data and too small a group of key stakeholders. Superintendent Smith chose to temporarily halt the process until community concerns could be addressed, enacting only the Alameda to Sabin priority.
- Rigler School has experienced crowding for several years because of neighborhood growth and grade-level expansion of the neighborhood and Spanish immersion programs. Rigler would have been rebuilt as a larger school had the Capital Bond Plan passed last May. When the Bond did not pass, district and school staff conducted a rapid process to identify options to relieve overcrowding. After a brief period of outreach to Rigler and Vernon families, grades 7 and 8 shifted from Rigler to Vernon for a two-year period, until a full process could produce a more permanent solution.

These two previous processes were merged this fall and considered in light of new school size targets. A new community engagement protocol has been used to guide interaction between district staff and school staff, parents, students and community members. Staff attended more than 20 meetings across 10 Northeast Portland schools to share information and gather enrollment-related ideas, concerns and questions before releasing a set of enrollment balancing options that directly impact six of those schools: Alameda, Beaumont, Irvington, Rigler, Sabin and Vernon.

Throughout the process, community members were also eager to discuss district-wide program issues, including the parity and equity of middle-grade programs in K-8 and middle schools, the status and future of special programs such as immersion, International Baccalaureate and ACCESS, and the purpose and effectiveness of the lottery transfer system. While these issues may not all be resolved through enrollment balancing work, dialogue around them is expected to continue in the coming year and to expand to include additional stakeholders.

### III. **RELATED POLICIES/BEST PRACTICES**

*(Explain how the item relates to the District's policies. Also describe any best practice research used to lead staff to their recommendation)*

The process for completing an annual enrollment data analysis and conducting boundary changes, including implementation procedures, is defined in Policy 4.10.051-P, Student Enrollment & Transfer and Administrative Directive 4.10.054-AD, Student Transfers

Additional Board actions for specific schools:

- Resolution x3497A (May 4, 2006): Expansion of Sabin Elementary to a K-8 School
- Resolution 4406: Temporary Relief Measure for Alameda
- Resolution xxxx: Rigler

### IV. **FISCAL IMPACT**

*(Use this section to outline the financial implications of the action requested.)*

No facility impacts are anticipated as a result of changes outlined in this plan. Current transportation routes for Rigler students, including two routes that serve Vernon, are expected to be sufficient for transportation needs to Beaumont, with the exception of next year when a bus will still be needed to support Rigler 8<sup>th</sup> graders attending Vernon.

Above-formula staff allocations are likely at Vernon next year to stabilize that program as Rigler students phase out.

Additional fiscal impacts based on enrollment changes will be addressed through the staffing and budget process, and based on 2012 staffing ratios.

### V. **COMMUNITY ENGAGEMENT**

*(Review of all stakeholders, including students and union partners, involved in the development of the proposed policy or resolution)*

Enrollment balancing utilized a new school district protocol for community engagement this fall. Regional Administrator Karl Logan and Enrollment and Transfer Director Judy Brennan led more than two dozen meetings on this topic at 10 schools and involving several community-partner organizations. The meetings ranged from small group sessions convened by a community partner and conducted in Spanish, to meetings with each of the potentially affected school communities, to large community forums with more than 150 attendees. Parents and principals also helped design, lead and facilitate school-based meetings.

A website on the district's main page provided access to detailed enrollment data, proposed enrollment balancing options, maps and other information. Staff also provided direct information to families and community members through: postcards mailed to all residents in potential boundary change areas; autodialer messages, family advisories and information tables at schools; outreach to neighborhood associations and other community partners; and media advisories, news releases and articles in PPS print and electronic publications.

A complete engagement plan is attached to this document. Notebooks with transcripts and summaries of community meetings, as well as e-mails and letters submitted by community members, are available in the Board office.

## VI. BOARD OPTIONS

*(What action is requested? Outline options and acknowledge other perspectives. Financial costs associated with specific options should be included if relevant.)*

Based on current and forecast enrollment data and feedback received from staff and community members, the following scenarios were proposed to balance enrollment between schools:

- Boundary changes from the western edge of the Alameda/Beaumont attendance area to Irvington and Sabin schools.
- Conversion of Rigler or Sabin to K-5 schools, with middle-grade students assigned to either Beaumont MS or Vernon PK-8 (only in the case of Rigler).
- Addition of a feeder school to Beaumont, either Rigler or Sabin.

Staff also considered numerous other options, including boundary changes to allow Rigler to continue as a K-8 school and shifting areas of the Alameda boundary to the north or east, instead of to the west. The attached chart shows staff's assessment of these options when weighed against the minimal factors for consideration outlined in Policy 4.10.045-P and Administrative Directive 4.10.049-AD.

Programmatic features associated with the options include the continuation of Spanish Immersion from Rigler to either Beaumont or Vernon, additional supports to Vernon to maintain programs if Rigler students are phased out and the future of the Sabin Middle Years IB program should that school convert to a K-5 and feed to Beaumont. As community members and staff from several schools requested that 6<sup>th</sup> grade slots be better controlled through the annual lottery, that topic was handed to the Superintendent's Advisory Committee on Enrollment and Transfer (SACET) for consideration and recommendation.

Community feedback was collected on the staff proposals at information tables set up at each affected school during parent-teacher conferences, and at three community forums held in late November-early December. Notice of the plans was communicated through fliers home to parents, postcards to households in the Alameda boundary change area, as well as the District website, PPS Pulse, social media site and information releases to media and community partner organizations.

In summary:

- While Rigler parents were reluctant to end the K-8 program at their school, they overwhelmingly supported Beaumont as the location for their middle-grade students, citing proximity, program variety and the equalizing factor of all students being new at 6<sup>th</sup> grade in a middle school.
- Sabin families spoke in support of remaining a PK-8 school and offering an IB program through 8<sup>th</sup> grade, while raising concern about the impact on the ACCESS program.
- Many responses from Alameda families were neutral, with acknowledgement that change is necessary. Residents from the east end of the boundary were grateful that their students were not affected by change, whereas families from the proposed boundary change area were unhappy that their homes would no longer be assigned to Alameda, which is closer for some than Irvington or Sabin. A number of families requested that current Alameda students in the boundary change area be allowed to continue on to Beaumont with their cohort.
- The Alameda Neighborhood Association requested that the area east of the Alameda boundary be moved instead of the west end, that current Alameda students who do not live in the boundary be returned to their neighborhood school to speed the rate of change at Alameda, and that current Alameda students affected by change be assured a place at Beaumont and Grant.
- The King School PTA raised the concern that the current process did not take into consideration a broad enough group of schools, and that a boundary change between Sabin and King is needed to increase enrollment at King.
- SACET is interested in pursuing the middle-grade transfer limit issue, but suggested that there is not sufficient time to respond to this matter and engage stakeholders before the start of the coming transfer cycle.

## **VII. STAFF RECOMMENDATION**

*(Convey the specific recommendation on any and all of the options listed or overall recommendation regarding the item.)*

No single set of changes meets all criteria, and all options bring some level of change and loss to the affected schools. Staff supports the following enrollment changes:

- **Boundary changes from the western edge of the Alameda/Beaumont attendance area to Irvington and Sabin schools.**
- **Conversion of Rigler to a K-5 school, with middle-grade students assigned to Beaumont MS.**
- **Above-formula supports at Vernon next year, to ease the phase-out of Rigler students.**

Staff feels that this set of changes will provide relief to overcrowded schools (Alameda and Rigler), and best use available space at under-enrolled schools (Sabin and Beaumont), without limiting the district's ability to make other changes as warranted to balance enrollment at other nearby schools in the future. Estimated enrollment at all six schools moves closer to district enrollment targets with these proposed changes. Further, by adding Rigler as a feeder school, Beaumont will increase its diversity while reducing dependence on transfers, which should strengthen programs at other North and Northeast schools serving middle grades.

For the most part, homes in the Alameda boundary change zone are several blocks closer to Alameda than to Sabin or Irvington. However, there is space at those schools to easily absorb additional students without causing feeder pattern changes or impacting additional enrollment balancing efforts that are needed in other schools. Therefore, staff recommends that the west edge of Alameda change at this time. Additional shifts to other parts of the Alameda boundary may be considered in future years if needed to manage unanticipated growth.

The proposed changes would cause a split middle-school feeder pattern, as Rigler students would continue on to Madison after Beaumont, while Alameda students are assigned to Grant. When considering student stability, this plan appears to offer a stable assignment plan, particularly for Rigler middle-grade students. As a result of closures and reconfigurations over the past 12 years, students in the Rigler boundary have had eight different middle grade assignments. Stability for these students was one of the most compelling criteria for staff during this process.

## **VIII. TIMELINE FOR IMPLEMENTATION/EVALUATION**

*(What is the timeline? How will progress be measured?)*

Proposed changes would begin in September 2012 as follows, in accordance with Board Policy 4.10.045-P and Administrative Directive 4.10.049-AD:

- Boundary change from Alameda to Irvington and Sabin: Kindergartners and new students at other grades would attend the new neighborhood school. Current students from the boundary change area who are attending Alameda now may remain through 5<sup>th</sup> grade, and, their younger brothers and sisters have a guarantee to co-enroll with them at Alameda.
- Boundary change from Rigler to Beaumont: Current 5<sup>th</sup> and 6<sup>th</sup> grade students at Rigler would be assigned to Beaumont, including students in the Spanish Immersion program. Current 7<sup>th</sup> grade students who moved from Rigler to Vernon this year have the right to complete the 8<sup>th</sup> grade at Vernon. However, in recognition that this could result in some families with students split between three schools, individual contact will be made with the 7<sup>th</sup> graders and, where possible, changes to different schools either for these students or for their younger siblings will be honored.

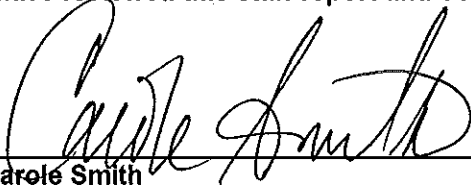
To minimize the negative impact of additional transitions, staff supports the community request to allow all current Rigler students to continue together on to Beaumont for grades 6-8. Additionally, all Alameda students residing in the boundary change area should be allowed to continue on to Beaumont for middle school. This modification from existing Board policy will allow students who expected to be together through 8<sup>th</sup> grade to do so, and will ease the rate of transition at Sabin, which will have very limited space until ACCESS is relocated.

We acknowledge that this measure adds yet another layer of exemptions from the proposed boundary change, which slows the pace of change and requires additional attention for years to come. We support the request of several School Board members to review our boundary change policy and make adjustments as necessary to ensure a clear, fair and consistent approach to implementation. In the absence of that additional guidance, however, we support maintaining K-8 consistency, especially for non-neighborhood Rigler students who have been affected by overcrowding and change at that school over the years, and should not be excluded from moving to Beaumont with their cohort.

If approved, staff and community members across all affected schools will begin planning for, among other needs:

- The smooth transition of students and teachers.
- The development and implementation of a Spanish Immersion program at Beaumont.
- Supports as needed to maintain program stability at Vernon throughout the phase-out of Rigler students.
- A timeline and location plan for ACCESS to move from Sabin to a larger space.
- Consideration of additional supports at affected schools as identified by an implementation team.

I have reviewed this staff report and concur with the recommendation to the Board.



Carole Smith  
Superintendent  
Portland Public Schools

12.18.2011

Date

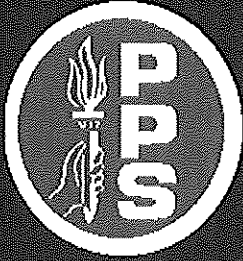
#### ATTACHMENTS

*(List all supporting documentation, including resolution, etc.)*

- A. Boundary map
- B. Enrollment change worksheet
- C. Analysis of factors for consideration

#### PPS District Priorities FY 2011-12

1. Improve Milestone outcomes
2. Successful implementation of High School System Design
3. Improve English Language Learners and Special Education Services
4. Increase cultural competence and diversity of staff
5. Build shared leadership and accountability for results
6. Measure and report on effectiveness of schools and programs
7. Design and implement Capital Improvement Plan
8. Deepen community and student engagement



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## SUPERINTENDENT'S RECOMMENDATION TO THE BOARD AND STAFF REPORT

**TITLE: MIDDLE SCHOOL GUARANTEES STAFF REPORT**

Board Committee Meeting Date: N/A

District Priority: 6 and 8

Board Meeting Date: January 23, 2012

Executive Committee Lead: Zeke Smith/  
Carla Randall

Department: Office of Schools/Enrollment & Transfer

Staff Lead: Karl Logan/Sascha Perrins/Judy  
Brennan

### I. ISSUE STATEMENT

*(Use this section to briefly explain the subject—2-3 sentences)*

During the 2005-06 school year, the School Board provided guarantees for Skyline students to attend West Sylvan Middle School and Sabin students to attend Beaumont Middle School as part of the K-8 school conversions. The guarantees included transportation to the middle schools, and were subject to review in 2011. This fall, staff has analyzed the impacts of the guarantees, and gathered input from staff, parents and community members in the Sabin and Skyline communities.

### II. BACKGROUND

*(Include information related to the history of the item and any relevant timing issues)*

The middle school guarantees began fully in the 2007-08 school year. Students interested in transferring to their guaranteed middle school have completed an on-time school choice application during the standard transfer cycle, and were approved to the middle schools without filling a lottery slot. Students have been provided transportation from stops near their homes to and from their middle schools.

Staff measured the effects of the guarantees by looking at the number of transfers, the performance of students who remained at a K-8 or transferred to a guaranteed middle school, the estimated transportation cost and the estimated staff impact related to the transfers. We also gathered community feedback through numerous meetings and e-mails received from Sabin over the past year, and from Skyline through this fall.

Details of our analyses are attached to this document. In summary:

- The guarantees resulted in an average of 38 Skyline students per year attending grades 6-8 at West Sylvan, while 22 Sabin students on average attended Beaumont.
- Test scores for a cohort of students who were at Skyline or Sabin in 5<sup>th</sup> grade and then attended either West Sylvan or Beaumont through the guarantee did not provide clear evidence that either model resulted in more students meeting or exceeding benchmarks.
- Total estimated transportation cost over the five-year period was \$1,650,000, 70% of which (\$1,155,000) was reimbursed by the State of Oregon. Of the net PPS costs (\$495,000), 85% was allocated toward Skyline buses because of the higher number of students participating in that guarantee and the low density and large size of that neighborhood.
- Had the guarantee not been in place, it is estimated that enough additional students would have attended Skyline and Sabin to warrant on average .8 FTE annually at each school.

Feedback from community members has been mixed. Some strongly support ending the guarantee (particularly Sabin parents seeking support for their K-8 program) and others advocate



for the guarantee to continue, as it provides access to a program they believe best serves their students.

**III. RELATED POLICIES/BEST PRACTICES**

*(Explain how the item relates to the District's policies. Also describe any best practice research used to lead staff to their recommendation)*

Resolution 3403 (December 12, 2005): Expansion of Skyline Elementary to a K-8 School  
Resolution x3497A (May 4, 2006): Expansion of Sabin Elementary to a K-8 School  
Policy 4.10.051-P, Student Enrollment & Transfer  
Administrative Directive 4.10.054-AD, Student Transfers

**IV. FISCAL IMPACT**

*(Use this section to outline the financial implications of the action requested.)*

Total transportation funds related to the guarantee are estimated at \$330,000 per year, with the net PPS portion \$99,000 per year.

Modifying transportation from Skyline to West Sylvan would reduce that cost by about \$24,750 each year until phased out, while ending transportation procedures for Sabin would reduce costs by an additional \$16,500.

Differences in student enrollment are expected to be cost neutral, as more FTE needed at one school is expected to mean fewer FTE needed elsewhere. Staff will be determined through the annual staffing and budget procedures.

**V. COMMUNITY ENGAGEMENT**

*(Review of all stakeholders, including students and union partners, involved in the development of the proposed policy or resolution)*

Feedback has been gathered through public meetings at both schools, and through e-mails sent in from stakeholders. Outreach occurred through news advisories and fact sheets (distributed to media, Northeast Coalition of Neighborhoods, Central Northeast Neighborhoods, pre-K providers), PPS Pulse e-newsletter, PPS web site and social media; sabinparents.org website, school auto-dialers, meeting fliers and parent-to-parent efforts.

Discussion of this issue began in the Sabin community as part of the Boundary Advisory Committee (BAC) process that occurred last school year, and was picked up again this fall. In addition to announced community meetings, district staff met numerous times with Sabin Site Council, and attended a Principal's Coffee in November.

District staff attended a PTA meeting at Skyline November 1, and held a separate community meeting there December 1.

**VI. BOARD OPTIONS**

*(What action is requested? Outline options and acknowledge other perspectives. Financial costs associated with specific options should be included if relevant.)*

Based on the data and feedback available, staff has focused on the following two ways to proceed:

1. Continue with reduced transportation: Allow the transfer guarantee mechanism to continue, but reduce transportation down to centralized stops for Skyline and eliminate transportation completely for Sabin, trimming transportation costs by two-thirds.
2. End the guarantee, and phase-out transportation: Skyline and Sabin students would have equal transfer rights into West Sylvan and Beaumont as other non-neighborhood students, including sibling preference. Transportation would be phased out to provide educational

stability for current students, possibly with the conversion to centralized stops for Skyline students.

**VII. STAFF RECOMMENDATION**

*(Convey the specific recommendation on any and all of the options listed or overall recommendation regarding the item.)*

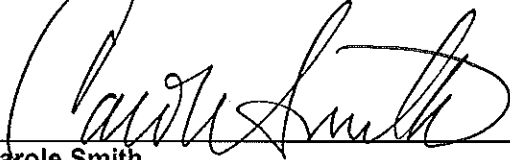
Because of the high cost of maintaining transportation and the goal of stabilizing enrollment at small K-8 schools, staff recommends that a middle school guarantee no longer be available for Sabin and Skyline students. We recommend that transportation be phased out for Skyline students, utilizing the most efficient centralized routing system possible, and be eliminated for Sabin students beginning in September 2012.

**VIII. TIMELINE FOR IMPLEMENTATION/EVALUATION**

*(What is the timeline? How will progress be measured?)*

Phase out of the guarantee, including changes in transportation, would begin for the coming transfer cycle and 2012-13 school year. Families would be notified of the change prior to the start of the coming transfer cycle. Lottery transfer remains an option for Sabin and Skyline options, but within the slots available and under the same policies as other PPS applicants. Slots at Beaumont and West Sylvan will be set in accordance with guidelines other PPS middle schools.

I have reviewed this staff report and concur with the recommendation to the Board.



Carole Smith  
Superintendent  
Portland Public Schools



Date

**ATTACHMENTS**

*(List all supporting documentation, including resolution, etc.)*

- A.K-8 to Middle Schools transfer guarantees report
- B.
- C.

**PPS District Priorities FY 2011-12**

1. Improve Milestone outcomes
2. Successful implementation of High School System Design
3. Improve English Language Learners and Special Education Services
4. Increase cultural competence and diversity of staff
5. Build shared leadership and accountability for results
6. Measure and report on effectiveness of schools and programs
7. Design and implement Capital Improvement Plan
8. Deepen community and student engagement

**Northeast Boundary Change Options: Analysis of Factors for Consideration**

		<b>Factors specified in Policy 4.10.045-P, Student Assignment to Neighborhood Schools</b>		
<b>Boundary change option</b>	<b>In Supt's Recommendation?</b>	<b>Stable feeder pattern:</b> Allow as many students as possible to move together to next school level; preferably feed one-two high schools.	<b>Diversity:</b> Aim to reflect district-wide diversity in language, culture and SES; consider different learning needs	<b>Compact boundaries:</b> Limit walking & biking barriers; keep neighborhoods together; minimize transport time/distance
<b>West edge of Alameda to Sabin</b>	Yes	Meets: Sabin feeds Grant	Partially meets: Does not increase diversity at Alameda or Sabin, but ensures SPED population remains at Alameda	Does not meet: Sabin is further walking distance; more student crossing Fremont; not aligned with neigh assn boundary
<b>West edge of Alameda to Irvington</b>	Yes	Meets: Irvington feeds Grant	Partially meets: Does not increase diversity at Alameda or Irvington, but ensures SPED population remains at Alameda	Partially meets: Irvington slightly further walking distance; aligned with neigh assn. boundary
<b>East edge of Alameda to Roseway Heights</b>	No	Does not meet: Roseway Heights feeds Madison	Partially meets: Does not increase diversity at Alameda or Roseway Heights and ensures SPED population remains at Alameda	Does not meet: Adds students outside of 1 mile walk zone; crosses Sandy & 57th.
<b>South edge of Alameda to Beverly Cleary</b>	No	Meets: Beverly Cleary feeds Grant	Partially meets: Does not increase diversity at Alameda or Beverly Cleary; ensures SPED population remains at Alameda; potential overcrowding at Beverly Cleary may impact space for SPED program there	Partially meets: Beverly Cleary slightly further walking distance; not aligned with neigh assn boundary
<b>North edge of Alameda to Vernon</b>	No	Does not meet: Vernon feeds Jefferson/Madison	Partially meets: Does not increase diversity at Alameda; but adds white students to Vernon and ensures SPED population remains at Alameda	Does not meet: Further walking distance; students crossing Prescott & Alberta; not aligned with neigh assn boundary
<b>Northwest portion of Rigler K-8 to Vernon &amp; Faubion</b>	No	Meets: Vernon & Faubion feed Jefferson /Madison	Partially meets: Likely to increase poverty rate at Faubion & Vernon	Does not meet: Adds students outside of 1 mile walk zone; crosses 42nd; not aligned with neigh assn boundary

***Northeast Boundary Change Options: Analysis of Factors for Consideration***

<b>Southeast portion of Rigler to Scott</b>	No	Meets: Scott feeds Madison	Partially meets: Likely to increase poverty rate at Scott, reduce poverty rate at Rigler	Partially meets: Neutral change for Rigler students, but requires Scott students to move to further school; not aligned with neigh assn boundary
<b>All of Rigler 6-8 to Beaumont</b>	Yes	Partially meets: Splits Beaumont to Grant and Madison	Partially meets: Increases baseline poverty rate at Beaumont, keeps space for SPED classrooms, no change for Rigler	Partially meets: Adds a small number or students to non-walk zone
<b>All of Rigler 6-8 to Vernon</b>	No	Meets: Vernon feeds Jefferson /Madison	Does not meet: No change for Rigler or Vernon	Does not meet: Adds students outside of 1 mile walk zone; crosses 42nd; not aligned with neigh assn boundary
<b>All of Sabin 6-8 to Beaumont</b>	No	Meets: Sabin feeds Grant	Does not meet: Less diversity at Beaumont, no change at Sabin	Does not meet: Adds current walkers to Beaumont bus zone

**Northwest Boundary Change Options: Analysis of Factors for Consideration**

<b>s, and Administrative Directive 4.10.049-AD, Student Assignment Review &amp; School Boundary Changes</b>		
<b>Optimal facility use:</b> Minimize building changes; conserve resources; right-size enrollment to program needs	<b>Enrollment stability:</b> Set boundaries that don't require frequent change; consider program impacts nearby	<b>Limit student impact:</b> Move the smallest number of students possible; avoid sequential changes to same students; avoid making small group feeder splits
Meets: Relieves overcrowding while adding students to a small school	Partially meets: May not provide enough relief to Alameda	Meets
Partially meets: Relieves overcrowding but Irvington may see space constraints in the future	Partially meets: May result in future overcrowding at Irvington; may not provide enough relief to Alameda	Meets
Partially meets: Relieves overcrowding, but eliminates space to relieve Scott and other crowded schools	Partially meets: Does not allow for other needed changes in area	Partially meets: causes small group split HS feeder
Does not meet: Beverly Cleary has no space for additional lower-grade students	Does not meet: Requires other changes	Does not meet: Requires other changes
Partially meets: Relieves overcrowding, but may cause over-enrollment at Vernon over time	Partially meets: Does not allow for other needed changes in area; may result in future overcrowding	Partially meets: causes small group split HS feeder
Does not meet: Beverly Cleary has no space for additional lower-grade students	Does not meet: Requires other changes	Does not meet: Requires other changes

***Northeast Boundary Change Options: Analysis of Factors for Consideration***

Does not meet: Scott does not have space for more students without making additional shifts to other schools	Does not meet: Requires other changes	Does not meet: Requires other changes
Meets: Relieves overcrowding while adding students to a small school	Meets: Additional changes not needed, stabilizes 6-8 programs in nearby K-8 schools	Meets
Partially meets: Relieves overcrowding, but may cause over-enrollment at Vernon over time	Partially meets: Does not allow for other needed changes in area; may result in future overcrowding	Meets
Partially meets: Sabin would be a small PK-5 school	Partially meets; boundary stable, but IB program in question	Meets

## Enrollment Change Worksheet-Boundary Change Recommendations

Boundary changes are recommended for six schools in NE Portland.

This worksheet contains information about the potential impact of those changes.

### A. General information

School Area	Grade Structure	Feeder Pattern	Enrollment 2011	Free/Reduced (F/R) %: 2011
Alameda	K-5	Beaumont/Grant	782	10.6%
Beaumont	6-8	Beaumont/Grant	482	31.8%
Sabin	K-8	Beaumont/Grant	377	40.8%
Irvington	K-8	Beaumont/Grant	485	41.0%
Rigler	K-6	Madison	528	84.5%
Vernon	K-8	Jefferson/Madison	484	71.2%

### B. Changes proposed-See attached map for area details

**Alameda/Beaumont to Irvington change: Alameda boundary area west of 24th and south of Siskiyou reassigned to Irvington**

Student Counts by Grade: 2011-12 School Year

	K	1	2	3	4	5	6	7	8	Total	% F/R Lunch
At neighborhood school	8	8	8	7	4	1	2	3	3	44	4.5%
Not at neighborhood school	0	0	0	2	2	2	1	0	4	11	0.0%
<b>Total students</b>	<b>8</b>	<b>8</b>	<b>8</b>	<b>9</b>	<b>6</b>	<b>3</b>	<b>3</b>	<b>3</b>	<b>7</b>	<b>55</b>	<b>3.6%</b>
% at neighborhood school	100%	100%	100%	78%	67%	33%	67%	100%	43%	80%	

**Alameda/Beaumont to Sabin change: Alameda boundary area north of Siskiyou and west of 24th continuing northwest from where 24th meets Ridgewood to 26th, then north of Mason and west of 31st reassigned to Sabin**

Student Counts by Grade: 2011-12 School Year

	K	1	2	3	4	5	6	7	8	Total	% F/R Lunch
At neighborhood school	12	18	11	11	22	14	11	7	8	114	8.0%
Not at neighborhood school	9	1	2	1	2	4	3	4	9	35	11.0%
<b>Total students</b>	<b>21</b>	<b>19</b>	<b>13</b>	<b>12</b>	<b>24</b>	<b>18</b>	<b>14</b>	<b>11</b>	<b>17</b>	<b>149</b>	<b>9.0%</b>
% at neighborhood school	57%	95%	85%	92%	92%	78%	79%	64%	47%	77%	

**Rigler to Beaumont change: All of the Rigler boundary area assigned to Beaumont for grades 6-8, beginning with grades 6-7 in 2012, with 8th grade students remaining at Vernon**

Student Counts by Grade: 2011-12 School Year

	K	1	2	3	4	5	6	*7	*8	Total 6-8	% F/R Lunch
At neighborhood school	84	66	75	61	58	53	58	36	37	131	85.5%
Not at neighborhood school	19	20	27	27	36	38	35	43	35	113	69.9%
<b>Total students</b>	<b>103</b>	<b>86</b>	<b>102</b>	<b>88</b>	<b>94</b>	<b>91</b>	<b>93</b>	<b>79</b>	<b>72</b>	<b>244</b>	<b>78.3%</b>
% at neighborhood school	82%	77%	74%	69%	62%	58%	62%	46%	51%	54%	

### D. Estimated enrollment impacts

Enrollment estimates are based upon previous attendance patterns, including capture rates, which are unpredictable following boundary changes. The estimates shown below are for general planning purposes.

	Estimated enrollment impacts											
	Alameda boundary changes											
	Rigler 6-8 to Beaumont, beginning with grades 6-7											
	Alameda		Irvington		Sabin		Beaumont		Rigler		Vernon	
	2012	2017	2012	2017	2012	2017	2012	2017	2012	2017	2012	2017
(A) Forecast enrollment without changes	786	785	458	462	391	477	531	602	525	545	510	525
Grades subject to change	K	K-5	K	K-5	K	K-5	6-7	6-8	6	6-8	7	7-8
(B) Estimated students subject to change	-20	-149	8	42	12	107	111	160	-61	-69	-52	-98
(C) Estimated capture rate	N/A	N/A	81%	81%	73%	71%	N/A	74%	N/A	N/A	N/A	N/A
(D) Sub-total (B x C)	-20	-149	6	34	9	76	111	118	-71	-69	-52	-98
(E) Reduced transfers into Beaumont	N/A	N/A	6	18	6	18	-50	-135	N/A	N/A	4	12
(F) Sum of changes (D + E)	-20	-149	12	52	15	94	61	-17	-71	-69	-48	-86
<b>(A-D) Estimated enrollment after changes</b>	<b>766</b>	<b>636</b>	<b>470</b>	<b>514</b>	<b>406</b>	<b>571</b>	<b>592</b>	<b>585</b>	<b>454</b>	<b>476</b>	<b>462</b>	<b>439</b>

Notes:

(A) Forecast source: Population Research Center, November '11: Rigler forecast based on K-6 structure, Vernon forecast includes Rigler grades 7 & 8.

(B) The number of siblings allowed to attend Alameda are expected to be offset by new students who move into the area and attend the new neighborhood school.

(C) Estimated capture rates are based on current and forecasted rates at the receiving schools.

(D) The guarantee to Beaumont Middle School will expire in 2012, and transfer slots will be reduced to levels equal with other middle schools

**Comparison of OAKS Results for Transfer Guarantees and Other Students:  
Sabin to Beaumont vs. Sabin to Sabin  
Skyline to West Sylvan vs. Skyline to Skyline**

*NOTE: This analysis includes students in grade 5 at Sabin or Skyline in 2007-08 who attended the same school for all 3 subsequent years: grade 6 (in 2008-09), grade 7 (in 2009-10), and grade 8 (in 2010-11), and who had valid OAKS scores each year, excluding extended assessments.*

Subject	OAKS	Grade	Sabin to Beaumont	Sabin to Sabin	Skyline to West Sylvan	Skyline to Skyline
Reading	Number of Students		9	13	15	21
	Mean Score	5	226.7	219.6	228.6	229.6
		6	231.7	225.9	233.8	237.0
		7	236.3	229.5	238.6	246.4
		8	238.4	234.5	239.8	244.2
	Percent Meeting	5	88.9%	69.2%	80.0%	95.2%
		6	100.0%	76.9%	86.7%	90.5%
		7	100.0%	69.2%	86.7%	95.2%
		8	88.9%	76.9%	86.7%	95.2%
	Math	Number of Students		9	12	15
Mean Score		5	226.9	220.0	227.5	228.6
		6	235.3	225.1	237.9	241.5
		7	239.0	227.7	244.2	252.7
		8	240.1	235.1	247.9	253.9
Percent Meeting		5	100.0%	75.0%	93.3%	90.5%
		6	100.0%	83.3%	93.3%	95.2%
		7	100.0%	66.7%	100.0%	100.0%
		8	100.0%	58.3%	93.3%	95.2%
Science		Number of Students		9	13	14
	Mean Score	5	231.8	222.8	237.1	239.6
		8	240.1	237.5	246.1	248.9
	Percent Meeting	5	77.8%	30.8%	92.9%	100.0%
		8	100.0%	61.5%	78.6%	100.0%
	Writing	Number of Students		10	13	15
Mean Score		7	39.0	34.4	40.3	37.9
Percent Meeting		7	70.0%	30.8%	66.7%	52.4%



BOARD OF EDUCATION  
SCHOOL DISTRICT NO. 1J, MULTNOMAH COUNTY, OREGON

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REGULAR BUSINESS MEETING

January 9, 2012

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Purchases, Bids, Contracts

The Superintendent RECOMMENDS adoption of the following items:

Numbers 4532 and 4533

**RESOLUTION No. 4532**

Revenue Contracts that Exceed \$25,000 Limit for Delegation of Authority

**RECITAL**

Portland Public Schools (“District”) Public Contracting Rules PPS-45-0200 (“Authority to Approve District Contracts; Delegation of Authority to Superintendent”) requires the Board of Education (“Board”) to enter into and approve all contracts, except as otherwise expressly authorized. Contracts exceeding \$25,000 per contractor are listed below.

**RESOLUTION**

The Superintendent recommends that the Board approve these contracts. The Board accepts this recommendation and by this resolution authorizes the Deputy Clerk to enter into agreements in a form approved by General Counsel for the District.

**NEW CONTRACTS**

<b>Contractor</b>	<b>Contract Term</b>	<b>Contract Type</b>	<b>Description of Services</b>	<b>Contract Amount</b>	<b>Responsible Administrator, Funding Source</b>
Vernon PTA	01/01/12 through 06/13/12	R 58877	Vernon PK-8: Funds for 0.5 FTE for partial reinstatement of school-wide music program.	\$26,000	T. Hunter Fund 299 Dept. 9999 Grant S0253

**AMENDMENTS TO EXISTING CONTRACTS**

No Amendments to Existing Contracts

**INTERGOVERNMENTAL AGREEMENTS / REVENUE (“IGA/Rs”)**

No IGA/Rs

**LIMITED SCOPE REAL PROPERTY AGREEMENTS**

No Limited Scope Real Property Agreements

*N. Sullivan*

**RESOLUTION No. 4533**

Personal / Professional Services, Goods, and Services Expenditure Contracts  
Exceeding \$150,000 for Delegation of Authority

**RECITAL**

Portland Public Schools (“District”) Public Contracting Rules PPS-45-0200 (“Authority to Approve District Contracts; Delegation of Authority to Superintendent”) requires the Board of Education (“Board”) enter into contracts and approve payment for products, materials, supplies, capital outlay, equipment, and services whenever the total amount reaches \$150,000 or more per contract, excepting settlement or real property agreements. Contracts meeting this criterion are listed below.

**RESOLUTION**

The Superintendent recommends that the Board approve these contracts. The Board accepts this recommendation and by this resolution authorizes the Deputy Clerk to enter into agreements in a form approved by General Counsel for the District.

**NEW CONTRACTS**

<b>Contractor</b>	<b>Contract Term</b>	<b>Contract Type</b>	<b>Description of Services</b>	<b>Contract Amount</b>	<b>Responsible Administrator, Funding Source</b>
Western Bus Sales, Inc.	01/10/12	Purchase Order PO 105870	District-wide: Purchase of four 2012 Chevrolet, propane-powered, 18-passenger buses.	\$305,300	A. Leibenguth Fund 101 Dept. 5560
Quill Corporation	01/10/12 through 02/29/12  Includes all future extensions entered into by the parties.	Cooperative Agreement COA 58815	District-wide: School and classroom supplies and services, as needed; District will be using an existing InterMountain ESD (fka Umatilla-Morrow ESD) contract (start date: 10/12/10) on a cooperative basis as allowed in that contract’s terms.	Greater than \$250,000	D. Fajer Various funding sources
Waxie Sanitary Supply	01/10/12 through 07/30/12  Includes all future extensions entered into by the parties.	Cooperative Agreement COA 58880	District-wide: Sanitary maintenance supplies, tools, and equipment, as needed; District will be using an existing State of Oregon contract (start date: 07/31/07) on a cooperative basis as allowed in that contract’s terms.	Greater than \$250,000	D. Fajer Various funding sources
Mallory Safety & Supply, LLC	01/10/12 through 09/30/14  Includes all future extensions entered into by the parties.	Cooperative Agreement COA 58881	District-wide: Public safety, emergency preparedness, and related equipment and supplies, as needed; District will be using an existing InterMountain ESD (fka Umatilla-Morrow ESD) contract (start date: 09/01/11) on a cooperative basis as allowed in that contract’s terms.	Greater than \$250,000	D. Fajer Various funding sources
Independent Stationers	01/10/12 through 08/31/13  Includes all future extensions entered into by the parties.	Cooperative Agreement COA 58895	District-wide: Office supplies, as needed; District will be using an existing U.S. Communities contract (start date: 09/01/10) on a cooperative basis as allowed in that contract’s terms.	Greater than \$250,000	D. Fajer Various funding sources

Smucker Foodservice, Inc.	01/10/12 through 06/30/12	Material Requirements MR 58860	District-wide: Diverted commodity processing (peanut butter sandwiches), as needed; other parties to contract are Beaverton SD and Hillsboro SD.	\$200,000	G. Grether-Sweeney Fund 202 Dept. 5570
Open Meadow Alternative Schools, Inc.	10/01/11 through 09/30/12	Personal / Professional Services PS 58832	Franklin HS and Roosevelt Campus: Step Up wrap-around services for 9th-10th graders, including after-school tutoring, Saturday classes, mentorship, advocacy services, etc.	\$362,500	T. Hunter Fund 205 Dept. 5485 Grant G1116
Organization for Educational Technology and Curriculum	01/10/12	Purchase Order PO 105943	District-wide: Purchase of 5,584 Microsoft Windows, Office, and Visual Studio Pro licenses.	\$423,038	N. Jwayad Fund 101 Dept. 5581
Mountain States Networking	01/10/12	Purchase Order PO 105981	District-wide: Purchase of 10 Cisco extended service agreements and related licenses for servers, wireless access, and VoIP telephones.	\$172,487	N. Jwayad Fund 101 Dept. 5581
Lynch Mechanical Construction, Inc.	01/10/12 through 01/10/13	Construction C 58901	41 District sites: Steam trap repair and replacement; part of 2010 Recovery Zone Project.	\$499,542	T. Magliano Fund 421 Dept. 5597 Project E0115

**AMENDMENTS TO EXISTING CONTRACTS**

No Amendments to Existing Contracts

**INTERGOVERNMENTAL AGREEMENTS (“IGAs”)**

No IGAs

*N. Sullivan*

Other Matters Requiring Board Action

The Superintendent RECOMMENDS adoption of the following item:

Number 4534

**RESOLUTION No. 4534**

Reporting the Use of School Year Subaccount Funds in 2011-12

**RECITALS**

- A. The state legislature included a School Year Subaccount as part of the funding for school districts in the 2011-12 school year.
- B. All of the funds allocated to school districts under this Subaccount must be spent in 2011-12 and school districts are required to submit a written accounting of the use of these funds.
- C. The Chief Financial Officer has provided a Staff Report to the Superintendent on the proposed transaction. The recommendation outlined below is submitted for approval.

**RESOLUTION**

The Board of Education authorizes the superintendent or her designee to report on PPS use of the SYS funding as follows:

Portland Public Schools  
Funding Received: \$10,108,376.29

Description of enhancements and activities:

The School Year Subaccount represents 2.16% of Portland Public Schools' General Fund Revenue (\$467,301,167). Portland Public Schools will spend 100% of the School Year Subaccount funding in 2011-12 on its avowed budget priorities of ensuring that all students have access to a rigorous core program, effective educators and targeted student supports. The SYS funding is equivalent to 107 licensed FTE (\$94,407 average cost, fully loaded) or approximately twice as many classified positions. These funds reduced the number of licensed and classified staffing cuts that PPS would otherwise have made and allowed the district to maintain the length of the school year.

*N.Sullivan*

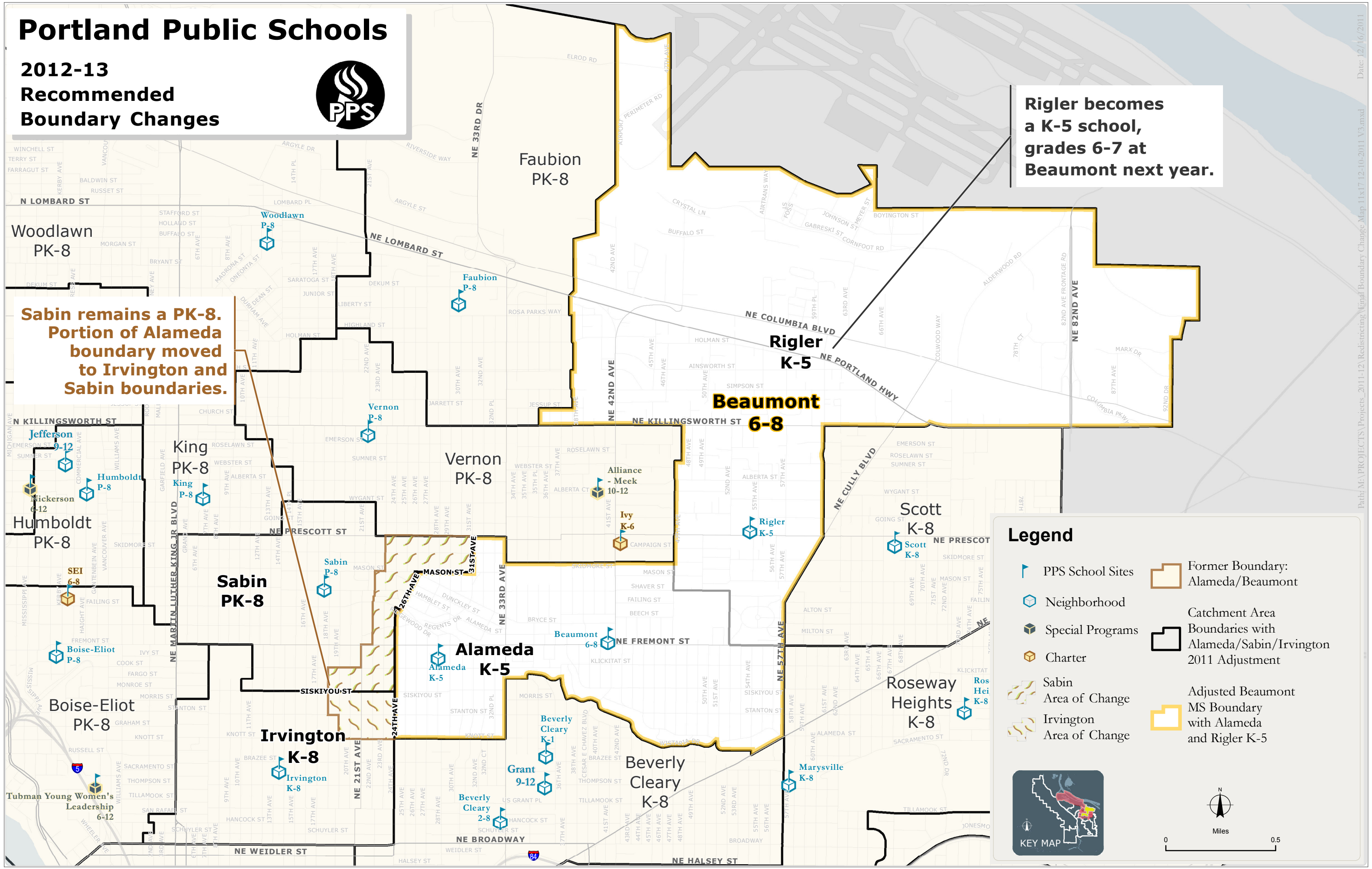
# Portland Public Schools

## 2012-13 Recommended Boundary Changes



**Rigler becomes a K-5 school, grades 6-7 at Beaumont next year.**

**Sabin remains a PK-8. Portion of Alameda boundary moved to Irvington and Sabin boundaries.**



### Legend

- PPS School Sites
- Neighborhood
- Special Programs
- Charter
- Sabin Area of Change
- Irvington Area of Change
- Former Boundary: Alameda/Beaumont
- Catchment Area Boundaries with Alameda/Sabin/Irvington 2011 Adjustment
- Adjusted Beaumont MS Boundary with Alameda and Rigler K-5

0 Miles 0.5