

BOARD OF EDUCATION

Portland Public Schools
STUDY SESSION
December 9, 2014

Board Auditorium

Blanchard Education Service Center
501 N. Dixon Street
Portland, Oregon 97227

***Note:** Those wishing to speak before the School Board should sign the public comment sheet prior to the start of the meeting. No additional speakers will be accepted after the sign-in sheet is removed, but testifiers 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 those testifying must abide by the Board's Rules of Conduct for Board meetings.*

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

This meeting may be taped and televised by the media.

AGENDA

1. **PUBLIC COMMENT** 6:30 pm
2. **DISCUSSION: MALES OF COLOR PLEDGE** 6:50 pm
3. **COMPREHENSIVE ANNUAL FINANCIAL REPORT** 7:10 pm
action item
4. **DISCUSSION: ENROLLMENT AND TRANSFER POLICY** 7:30 pm
5. **UPDATE: WORKLOAD COMMITTEE** 8:30 pm
6. **BOARD MEMBER CONFERENCE REPORTS** 9:00 pm
7. **BUSINESS AGENDA** 9:15 pm
8. **ADJOURN** 9:30 pm

Portland Public Schools Nondiscrimination Statement

Portland Public Schools recognizes the diversity and worth of all individuals and groups and their roles in society. The District is committed to equal opportunity and nondiscrimination based on race; national or ethnic origin; color; sex; religion; age; sexual orientation; gender expression or identity; pregnancy; marital status; familial status; economic status or source of income; mental or physical disability or perceived disability; or military service.



Board of Education Informational Report

MEMORANDUM

Date: December 11, 2014
To: Members of the Board of Education
From: Carole Smith
Subject: Portland Public Schools Males of Color Pledge

Attached please find the following:

- 1) Information on Great City Schools Back White House My Brother's Keeper Initiative
- 2) Statement from Council of Great City Schools Reaffirming Pledge on Males of Color in the Wake of the Ferguson Tragedy
- 3) Draft Resolution for Portland Public Schools Males of Color Pledge

RESOLUTION No. xxxx

Portland Public Schools Males of Color Pledge

RECITALS

1. In 2011, the Portland Public Schools Board of Education adopted a Racial Educational Equity Policy that states, "Closing this achievement gap while raising achievement for all students is the top priority of the Board of Education, the Superintendent and all district staff. Race must cease to be a predictor of student achievement and success."
2. To operationalize the Racial Educational Equity Policy, the Board reviews and receives regular reports on annual action plans.
3. The District has adopted three priorities to promote student achievement and success:
 - 1) All students will be reading at benchmark by the end of third grade.
 - 2) Reducing overall exclusionary discipline and eliminating disproportionality.
 - 3) Accelerating high school graduation and completion rates.
4. The District is developing an action plan in support of the Council of Great City Schools' Males of Color Pledge which is a collective commitment to improve educational outcomes for boys and young men of color and is part of the President's My Brother's Keeper Initiative.
5. The Board agrees with the Council of Great City Schools in its statement that, "On its face, the tragic events in Ferguson concerned the police and the local community. But ultimately, this is a case about how America's institutions, including our schools, respect the well-being, rights, and futures of all our young people. This broader reading of Ferguson extends to how our schools define and mete out justice and ensure that all students have access to the highest standards and opportunities."

RESOLVED

- A. The Board remains committed to the intent and purpose of the Racial Educational Equity Policy and its call for urgency to address the achievement gap in our schools and across the nation.
- B. Portland Public Schools is one of 67 urban school districts nationwide to sign on to the Males of Color Pledge. We support the attached Pledge by America's Great City Schools around Males of Color.
- C. The Board will continue to work with our city, county and community partners to support all students, specifically, to increase the Males of Color who are succeeding academically and socially in our schools, and who are on track to succeed in high school, college, career and as contributing members of our community.

News...News...



News...News...

Council of the Great City Schools

1301 Pennsylvania Avenue, N.W. ♦ Suite 702 ♦ Washington, D.C. ♦ 20004

EMBARGOED FOR RELEASE

July 21, 2014 (12:30 p.m., Eastern)

CONTACT: Henry Duvall

(202) 393-2427 or hduvall@cgcs.org

Urban Schools Announce Unprecedented Commitment to Improve Achievement of Young Men of Color

Great City Schools Back White House My Brother's Keeper Initiative

WASHINGTON, July 21 – Leaders of 60 of the largest urban school systems in the country have joined in a first-ever collective commitment to improve educational outcomes for boys and young men of color by implementing a set of evidence-based strategies that range from early childhood to graduation, the Council of the Great City Schools announced today at a White House event with President Obama. Collectively, the school systems educate a third or more of America's African American and Latino students and nearly forty percent of low-income boys and young men of color.

In a call to action by the Council of the Great City Schools, the primary coalition of the nation's urban schools, each of the school systems support boosting efforts to prepare males of color for college and careers, to reduce the disproportionate number who drop out of school or who are suspended, and to help them succeed.

With such a large portion of the country's school-age African American males and Hispanic males enrolled in big-city public schools, urban-school leaders agree that they have an obligation to teach all students to the highest academic standards and prepare them for today's global society.

"Our job as urban educators is not to reflect or perpetuate the inequities that too many of our males of color face; our job is to eliminate those inequities—and that is what we pledge to do," stressed Council Executive Director Michael Casserly. "We are pleased to join forces today with the White House, the U.S. Department of Education, and our other partners in an unprecedented shared commitment to improve the educational and social opportunities of our young men of color," he added.

In "A Pledge by America's Great City Schools," each of the 60 urban school systems committed to carrying out 11 specific actions, which include:

- Ensuring that pre-school efforts better serve males of color and their academic and social development;
- Adopting and implementing elementary and middle school efforts to increase "the pipeline" of males of color who are on track to succeed in high school, and increasing the numbers participating in advanced placement, honors, and gifted and talented programs;
- Keeping data and establishing protocols to monitor the progress of males of color and intervene at the earliest warning signs of problems;

- Reducing the disproportionate number of males of color who are absent, suspended, expelled, or placed inappropriately in special education classes; and
- Working to transform high schools with low graduation rates among males of color and striving to increase the numbers of males of color and others who complete the FAFSA forms for college aid.

The Council is also announcing a partnership with the College Board to work jointly to increase the numbers of males of color participating and succeeding in Advanced Placement (AP) classes in our urban public schools.

In late 2010, the Council of the Great City Schools sounded an alarm with the release of an eye-opening report indicating that young black males in America are in a state of crisis.

The widely publicized report – *A Call for Change: The Social and Educational Factors Contributing to the Outcomes of Black Males in Urban Schools* – led to Council testimony before the U.S. Senate Subcommittee on Children and Families, and prompted the organization to release a companion analysis of Hispanic students.

The *Call for Change* study called for a White House initiative, noting that the education, social, and employment outcomes of African American males are equivalent to a “national catastrophe” requiring coordinated national attention.

Since the release of the reports, the Council established internal and external advisory committees to guide the urban school coalition on its work with males of color. It commissioned a series of papers by the nation’s leading authorities to propose strategies for improving urban school efforts on behalf of African American males. And in August 2012, the authors of the papers converged at a summit with the U.S. Department of Education and the White House to discuss strategies to improve outcomes for African American males.

The work of the authors has culminated in the development of a Council e-book titled *A Call for Change: Providing Solutions for Black Male Achievement*, which is available at no cost through Amazon and other outlets.

Other Council activities to improve the outcomes of males of color include:

- A national town hall meeting late last year on race, language, and culture, moderated by noted Harvard law professor Charles Ogletree, taped and televised on PBS
- A study titled *Today’s Promise, Tomorrow’s Future: The Social and Educational Factors Contributing to the Outcomes of Hispanics in Urban Schools*, as well as reports on English language learners; and
- Student and urban school-district surveys to gauge the challenges and possible interventions needed to improve the outcomes of males of color.

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A Pledge by America's Great City Schools

- Whereas, some 32 percent of the nation's African American males and some 39 percent of the nation's Hispanic males attend school each day in one of the Great City School systems; and
- Whereas, the academic achievement of Males of Color in the nation's urban school systems and nationally is well below what it needs to be for these young people to be successful in college and careers; and
- Whereas, disproportionate numbers of Males of Color drop out of urban schools and often have low attendance rates; and
- Whereas, Males of Color disproportionately attend under-resourced schools and are taught by the least-effective teachers; and
- Whereas, the nation's Great City Schools have an obligation to teach all students under their aegis to the highest academic standards and prepare them for successful participation in our nation:
- Be It Therefore Resolved that, the Great City Schools pledge to ensure that its pre-school efforts better serve Males of Color and their academic and social development, and
- That the Great City Schools will adopt and implement elementary and middle school efforts to increase the pipeline of Males of Color who are succeeding academically and socially in our urban schools and who are on track to succeed in high school, and
- That the Great City Schools will keep data and establish protocols that will allow it to monitor the progress of Males of Color and other students in our schools and appropriately intervene at the earliest warning signs; and
- That the Great City Schools will adopt and implement promising and proven approaches to reducing absenteeism, especially chronic absenteeism, among Males of Color, and
- That the Great City Schools will develop initiatives and regularly report on progress in retaining Males of Color in school and reducing disproportionate suspension and expulsion rates, and
- That the Great City Schools will develop initiatives and regularly report on progress in increasing the numbers of our Males of Color and other students participating in advanced placement and honors courses and gifted and talented programs, and

- That the Great City Schools will strongly encourage colleges of education to adopt curriculum that addresses the academic, cultural, and social needs of Males of Color, and that the district will maintain data on how these teachers do with our Males of Color, and
- That the Great City Schools will develop initiatives and regularly report on progress in increasing the numbers of Males of Color and other students who complete the FAFSA, and
- That the Great City Schools will work to reduce as appropriate the disproportionate numbers of Males of Color in special education courses, and
- That the Great City Schools will work to transform high schools with persistently low graduation rates among Males of Color and others and to provide literacy and engagement initiatives with parents.
- That the Great City Schools will engage in a broader discussion and examination of how issues of race, language, and culture affect the work of our district.

Council of the Great City Schools

Albuquerque Public Schools	Anchorage School District
Atlanta Public Schools	Austin Public Schools
Baltimore City Public Schools	Birmingham Public Schools
Boston Public Schools	Bridgeport Public Schools
Broward County Public Schools	Buffalo Public Schools
Charlotte-Mecklenburg Public Schools	Chicago Public Schools
Cincinnati Public Schools	Clark County (Las Vegas) Public Schools
Cleveland Metropolitan School District	Columbus City School District
Dallas Independent School District	Dayton Public Schools
Denver Public Schools	Des Moines Public Schools
Detroit Public Schools	District of Columbia Public Schools
Duval County (Jacksonville) Public Schools	East Baton Rouge Parish School System
El Paso Independent School District	Fort Worth Independent School District
Fresno Unified School District	Guilford County (Greensboro) Public Schools
Hillsborough County (Tampa) Public Schools	Houston Independent School District
Indianapolis Public Schools	Jackson Public Schools
Jefferson County (Louisville) Public Schools	Kansas City (MO) Public Schools

Long Beach Unified School District	Los Angeles Unified School District
Miami-Dade County Public Schools	Milwaukee Public Schools
Minneapolis Public Schools	Nashville Public Schools
Newark Public Schools	Norfolk Public Schools
Oakland Unified School District	Oklahoma City Public Schools
Omaha Public Schools	Orange County (Orlando) Public Schools
Palm Beach School District	Philadelphia School District
Pittsburgh Public Schools	Portland Public Schools
Providence Public Schools	Richmond Public Schools
Rochester City School District	Sacramento City Unified School District
Saint Paul Public Schools	San Diego Unified School District
San Francisco Public Schools	Seattle Public Schools
Shelby County (Memphis) Public Schools	Toledo Public Schools



Council of the Great City Schools
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<http://www.cgcs.org>

FOR RELEASE
December 3, 2014

CONTACT: Henry Duvall
(202) 393-2427

**Statement by Michael Casserly
Executive Director
Council of the Great City Schools**

Reaffirming Pledge on Males of Color in the Wake of the Ferguson Tragedy

WASHINGTON -- The Council of the Great City Schools, the nation's premier coalition of large urban public school systems, stands in solidarity with President Obama and his call for action, fairness, and understanding in the wake of the recent Ferguson grand jury ruling.

On the surface, the tragic events in Ferguson concerned the police and the local community. But ultimately, this is a case about how America's institutions, including our schools, respect the rights, well-being and futures of all our young people. This broader reading of Ferguson extends to how our schools define and mete out justice and ensure that all students have access to the highest standards and opportunities.

Therefore, the Council and its member urban school systems recommit themselves to the pledge on males of color we took alongside the president earlier this summer to boost academic outcomes, reduce disproportionate suspensions and expulsions, and improve graduation rates for all our urban children.

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Board of Education

Superintendent Recommendation to the Board

Board Meeting Date: December 9, 2014 **Executive Committee Lead:** Yousef Awwad, CFO

Department: Accounting & Payroll **Presenter/Staff Lead:** Sharie Lewis, Director & TKW – External Auditor

SUBJECT:
2013-14 COMPREHENSIVE ANNUAL FINANCIAL REPORT (CAFR) AND SINGLE AUDIT

BACKGROUND

The District Auditor, Talbot, Korvola & Warwick, LLP, has issued an unmodified opinion on our financial reports for the year ended June 30, 2014 (see pages 1-3). An unmodified opinion is the technical term used to indicate a “clean audit” and is the highest level of opinion. It is the outcome that we expected.

CAFR AND SINGLE (A-133) AUDIT HIGHLIGHTS

- ◆ During the year, the District implemented one new accounting standard: GASB Statement 70. The implementation of this standard resulted in additional disclosures regarding the District's participation in the Oregon School Bond Guaranty Program (ORS328.321 to 328.356, which guarantees payment on the 2013 GO Bond debt. This additional disclosure can be found on page 44 in the Notes to the Basic Financial Statements.
- ◆ Total net position, which is an indicator of economic condition for the year, increased by \$65.5 million as shown in the Analysis of Activities on page 7. The overall increase in net position is the result of a \$15.9 million increase in assets, which includes cash & investments, fixed assets net of depreciation and Unfunded Actuarial Liability (UAL) investment; a \$48.8 million decrease in liabilities, which includes accounts payable, accrued wages payable, claims and judgments payable, outstanding debt, and UAL liability; and an \$819 thousand decrease in deferred inflows of resources for the receipt of the final insurance payment on the Marysville School fire claim. The \$15.9 million increase in assets combined with the \$49.6 million decrease in liabilities and deferred inflows results in a \$65.5 million overall increase in net position. This increase represents a positive economic condition for the District. The increase in Total Assets is primarily a result of increases in capital assets, as described on page 11. The relatively large decrease in liabilities resulted mainly from the repayment of \$36.0 million of GO Bond debt and \$11.5 million of pension debt, also shown on page 11.
- ◆ Government-wide activities are summarized and analyzed on pages 7-9 and presented on page 17. These reports use a “full accrual” economic basis, e.g. depreciation is added, transfers between funds are eliminated, capital asset and debt principal payments are removed from expenses, and the change in unfunded PERS and post-employment benefits liabilities is added to expenses. Total District revenues, when compared to the prior year, increased \$84.1 million from \$542.9 million to \$627.0 million, while total District expenses increased \$22.7 million from \$538.8 million to \$561.5 million. These changes resulted in a fully-accrued net increase of \$61.4 million in total net position. Major changes in revenues were from a \$33.3 million increase in State School Fund revenues, and \$44.8 million in new GO Bond tax revenues, \$11.8 million increased General Fund property and local option taxes, offset by a \$9.7 million

Reviewed and Approved by
Superintendent

A handwritten signature in cursive script, reading "Carrie Smith".

decrease in grant revenues (primarily School Improvement/Priority Focus, and Title 1). Major increases in expenditures were from increases in General Fund instructional wages and benefits (\$11.8 million) and support services wages and benefits (\$8.7 million).

- ◆ The operational result for the General Fund was a net gain of \$14.2 million (page 18), which increased fund balance to \$51.7 million. The District's final supplemental budget had planned a net loss of \$4.2 million (excluding contingency), therefore the overall increase to the beginning fund balance in the General Fund for next year will be \$18.4 million more than planned.
- ◆ Capital Bond fund work touched 30 schools and expended \$19.0 million. Bond proceeds were spent on the 2013 to 2015 summer improvement projects, the Marshall swing site, and master planning for Roosevelt, Franklin, and Faubion. Unspent bond proceeds at June 30, 2014 were \$90.5 million.
- ◆ The District had no Financial Statement Significant Deficiencies, no questioned costs and no material weaknesses for the year ended June 30, 2014 (see Single Audit pages 16-17).

WHERE THINGS ARE IN THIS YEAR'S CAFR

Here are some of the major sections of the CAFR where your assessment of the report would be greatly appreciated:

- ◆ Transmittal Letter, pages i-viii. This communication from the Superintendent and Accounting & Payroll Services Director explains the 4 major sections of the CAFR, the District's profile, PPS's Service Efforts and Achievements, the state and local economies, and the District's long-range planning.
- ◆ Management's Discussion and Analysis, pages 4-13. District management provides an overview narrative of balances and activities at the District-wide level, changes from the prior year, analysis of the District's major funds, budgetary highlights, capital and debt administration, and economic factors and next year's budget.
- ◆ For financial reporting, the District is required to use two different accounting methods in the CAFR; one method is used for government-wide and "business" type activities, and another is used for governmental "fund type" activities:
 - Government-wide statements (found on pages 16-17), and proprietary fund statements (on pages 25-27 and page 101) must measure and report all assets, liabilities, revenues, expenses, gains and losses using the economic resources measurement focus and accrual basis of accounting (also known as full-accrual). The economic resources focus includes significant differences from fund financial accounting such as reporting historical capital asset costs and long-term debt.
 - Governmental fund statements found on pages 18-23, and the budgetary fund schedules on pages 58-100, uses the financial resources measurement focus and modified-accrual basis of accounting.
 - The differences between these two methods of accounting are reported in the CAFR reconciliations on pages 21 and 24.
- ◆ The footnotes on pages 28-54 disclose the summary of significant accounting policies of the District and provide additional details for items such as cash and investments, capital assets, debt, risk management, commitment and contingencies and subsequent events.
- ◆ Budget versus Actual Variance schedules on pages 58-101 are summarized at the budgetary appropriation level, and report how each fund has complied with the Board's budgetary appropriations. The reports show both the original budget and final budget.

- ◆ The Statistical Section is on pages 114-142. The four parts of the statistical section are intended to provide the reader with a more complete context for the financial information presented in the CAFR. The 16 schedules presented show financial trends, revenue and debt capacity analysis, demographic and economic information and District operations.
- ◆ The Independent Auditor's Report on pages 143-145 is provided by the auditors and presents audit comments and disclosures required by state regulations. In this report the auditors explain the District's compliance in specific areas, and they explain their consideration of internal controls and any District control deficiencies they have found.

RELATED POLICIES / BOARD GOALS AND PRIORITIES

This audit report is indicative of a high level of fiscal accountability by PPS Finance staff. A clean audit and one item to be raised in a management letter are evidence of excellent performance. Last year the Association of School Business Officials and the Government Finance Officers Association awarded PPS their certificates of excellence and achievement in financial reporting.

PROCESS / COMMUNITY ENGAGEMENT

The CAFR will be published on the district website, shared with the Citizens Budget Review Committee, and various interest parties, mainly financial institutions, are issued copies. These reports are also required to be reported to various Federal entities.

ALIGNMENT WITH EQUITY POLICY IMPLEMENTATION PLAN

BUDGET / RESOURCE IMPLICATIONS

There is no direct fiscal / budget impact as a result of this audit. If the outcome had been less positive, it could have had a negative impact on PPS fiscal outlook including the District's ability to secure grant funding its ability to borrow funds and/or the cost of that debt would likely be impacted negatively. Additionally, in the case of adverse audit findings/issues, the State Office of the Department of Education has the authority to withhold State School Fund payments until audit findings and/or issues are resolved by the District.

NEXT STEPS / TIMELINE / COMMUNICATION PLAN

We recommend that the Board of Education accept and approve the Comprehensive Annual Financial Report, Reports to Management, and Report on Requirements of the Single Audit Act and OMB Circular A-133 of School District No. 1J, Multnomah County, Oregon for the fiscal year ended June 30, 2014 at the December 9, 2014 board meeting.

In order for PPS to meet the requirements of state and federal government the Board is asked to approve and accept these statements and reports. Finance staff will be happy to answer board members' questions; and any comments and suggestions for improvement are valuable to us.



Board of Education Informational Report

MEMORANDUM

Date: December 4, 2014

To: Members of the Board of Education

From: Judy Brennan, Enrollment and Transfer Director

Subject: Information regarding potential impact of proposed enrollment and transfer policy changes

Last month Superintendent Smith proposed a set of changes to align current enrollment and transfer policies and procedures with the district's Racial Educational Equity Policy. Information in this memo is provided in response to board member questions regarding the impact of some of the proposed changes. Specifically:

- Moving to a single mechanism for neighborhood school transfers
- Scenarios estimating the potential impact of proposed lottery preferences

Section I: MOVING TO A SINGLE MECHANISM FOR NEIGHBORHOOD SCHOOL TRANSFERS

For more than ten years PPS has allowed transfers into neighborhood schools through two mechanisms: an annual centralized lottery and hardship petitions that may be submitted at any time. Superintendent Smith has proposed shifting to a single mechanism: the hardship petition, as the only means for seeking transfer to a neighborhood school. Her recommendation is consistent with a proposal unanimously put forth by the Superintendent's Advisory Committee on Enrollment and Transfer (SACET). The committee saw the change as necessary to meet their charge of aligning transfer practices with the Racial Educational Equity Policy. Issues that led to their recommendation includes:

- Lower percentages of families of color and economically disadvantaged families use the annual lottery to request transfers when compared to the petition process.
- Families of color who met with the committee expressed little knowledge of the annual lottery process which takes place during a short time frame each winter. Families also emphasized the importance of being able to talk about their student's needs—to tell their story—when they are looking for transfer to another school.

- Lottery transfers for neighborhood high schools were largely eliminated in 2011, meaning that the hardship petition process has been the exclusive means of requesting transfer to comprehensive high schools for several years.
- Years of lottery results do not include key pieces of information: The reasons families seek transfers to other schools. This information is essential feedback to help inform discussions around replication and improving the climate and services at neighborhood schools.

Moving to a single form of transfer into neighborhood schools will address many of the concerns noted by SACET. The information below is intended to build knowledge of the petition process and to provide a brief outline of enhancements for moving forward to make sure the system remains family-friendly and culturally responsive, even if the number of petitions increases.

PPS PETITION TRANSFER PROCESS: HISTORY AND CONTEXT

PPS has operated a central department to review and decide hardship-based, petition transfer requests for many years. In 2002, the Enrollment and Transfer Center was created to manage petitions along with several others transfer functions, including a new, centralized school choice lottery, interdistrict transfers, foreign exchange and supervision agreements.

In the early 2000s, PPS allowed students to transfer between schools through a mostly decentralized process. Each school established its own timelines, applications and decision procedures. Each focus option also had distinct criteria for judging applications, including geography, ethnicity, gender, quality of essays, grades and test scores and letters of recommendation. Families interested in transfer had to keep track of multiple deadlines, fill out different applications and provide different types of supporting materials. There were variations in decision-making, as well, with some schools selecting students by merit, others using a first-come, first-served approach, and still others operating random lotteries.

Additionally, in 2002 the federal No Child Left Behind Act was signed in to law, and PPS was required to provide priority transfer options for students assigned to schools designated as “failing”. Soon after, the district revised policy 4.10.051-P, creating a single, centralized structure and timeline for transfers in or out of most PPS schools. Reliance upon a single lottery and a common set of ranked preferences, including those required to meet NCLB, were clear differences between the new system and the prior transfer practices.

Implementation of the new system was aided by a multi-million dollar federal school choice grant awarded to PPS in 2002. A large portion of the funds were used to develop a centralized school choice software tool, including online application and lottery engine, as well as operate an annual school choice fair and fill three full-time staff positions in the Enrollment and Transfer Center. Those funds expired in 2012.

The new, centralized system maintained a petition transfer option as the single mechanism for initiating, reviewing and deciding transfer requests outside of the annual lottery. In recent years, the NCLB requirements ended, and lottery slots were closed at most high schools and many elementary and K-8 schools with large enrollment. In response, the volume of petition requests has risen. Over the past three years, the ETC has processed more than 1,100 petition transfer requests annually.

School Year	Number of K-12 Petition Transfer Requests
2011-12	1,169
2012-13	1,414
2013-14	1,159

During this same timeframe ETC has lost 4 staff positions, a 33% reduction in force, due to the end of the federal grant described above, cuts to the general fund and the decision to shift a position to the Multiple Pathways department (to better align with services for students who have been out of school for a significant period of time).

STEPS IN THE PETITION TRANSFER PROCESS

A petition transfer request is initiated by a parent/guardian or student, typically through a phone call or e-mail to the Enrollment and Transfer Center. There are two full-time clerks who answer phones and provide general information. Four placement specialists receive the requests, conduct reviews and make recommendations. All petitions go to the enrollment director for decision. The process is aided by the department’s data analyst who creates reports detailing annual petition volume and results. Half the department is multi-lingual, able to assist families in English, Spanish, Russian and Ukrainian, and all have deep knowledge of PPS schools, programs and services.

A basic principle of the petition process is that every school must strive to meet the needs of all students assigned there. Petition transfers are allowed only when there is confirmed evidence that a student’s health, safety or educational development are at risk at the current or neighborhood school, and that the risk would be eliminated or substantially reduced at a different school. Schools should have the opportunity to learn about and try to remedy the conditions that cause families to seek transfer before the transfer is granted. Families are encouraged to talk with staff at their neighborhood school before beginning the petition process. For families who do seek transfer, here are the basic steps in the petition process:

- Parents complete a petition request form, stating the reason for the request and listing up to three transfer school preferences.
- Petition transfers are reviewed by Enrollment & Transfer Center placement specialist in the order received. Placement specialists may contact families to learn more about their situation, and may provide information about other resources and options.
- Specialists work to confirm evidence that a student’s health, safety or educational development are at risk at the current or neighborhood school, and that the risk would be eliminated or substantially reduced at a different school.
- Input from the principal of the current/neighborhood school is usually sought as part of the review process. Input may also be gathered from other PPS staff or staff from public agencies, such as Department of Human Services or law enforcement, if warranted.
- The review process takes approximately 1-2 weeks, depending on the volume of requests and the complexity of the situation. Students remain assigned to their current/neighborhood school during the time of the review.
- Petition decisions are made by the department director, with input from a placement specialist and other individuals noted above. Petition requests result in one of three outcomes:

- Petitions are approved when staff agrees that a valid reason for transfer has been given, and when there is space at the requested school. Approved transfers generally take effect immediately, but sometimes are delayed until the start of the next grading period or school year.
- Petitions may be denied if staff determines that the evidence of hardship does not warrant transfer. In those cases, families will be encouraged to continue working with staff at their current/neighborhood school to resolve the issue. A family also has the right to appeal this decision.
- Petitions may be denied even if staff agree that there is a valid reason for transfer, because there is no space to accommodate the student at the requested school. In those cases, a student remains assigned to the current/neighborhood school, and ETC will offer to work with the family to identify other schools that may have space for the student. A family also has the right to appeal this decision.
- The appeal process allows families who have been denied transfer by the ETC an additional level of review. Appeals are reviewed by the Senior Director of the current/neighborhood school. Appeals include additional, new information not provided to the ETC or evidence that the ETC did not follow established procedures. Senior Directors make appeal decisions within 10 working days of receiving new information from families. Their decisions are final.

As noted above, more than 1,100 petitions are reviewed in the ETC each year. A table showing common categories of requests, as well as the steps taken to complete a petition review is attached. A breakdown of petition results for the 2012-13 school year by socio-economic status and race/ethnicity is included, as well.

Petition review is a qualitative process, and each set of circumstances is somewhat unique, so there is no set scoring rubric. However, when gathering information and evaluating the merits of a petition requests, ETC placement specialists informally use a scale like that shown below to decide whether or not the transfer will be approved. There are typically at least three different staff members who review the petition request and provide a recommendation: the current/neighborhood school principals, the placement specialist and the department director. The director's role is to ensure that evidence is weighed equitably and consistently for each petition.

Petition factors for consideration	Highest rank	Lowest rank
Quality of evidence confirming hardship	Verification of a threat or hardship by a trained public agency staff members (such as DHS case worker or parole officer) with direct knowledge of circumstances	Threat, hardship or need cannot be verified
Verification of stated reason from current/neighborhood school	Current school is aware of situation and agrees that transfer is best option to remedy concern	Current school is unaware of situation and/or has remedies available to address situation

Sibling/family member status	A co-enrolled sibling attends the requested school due to placement for special education services	A family member who is not a co-enrolled sibling attends the requested school or a nearby school
Alignment with offerings at requested school	Requested school will be able to provide the program/service or student environment	Requested program/service or student environment will not be available
Space available at requested school	Requested school is student's neighborhood school	Class-sizes at requested grade are at or above district average
Space at current school	The current/neighborhood school is overcrowded	There is considerable room for new students at the current/neighborhood school

Enhancement opportunities

The petition transfer process is intended to offer a fair and consistent mechanism for families to request a transfer and for their reasons to be heard and seriously considered by staff in their school as well as in the central office. While many requests do not lead to the result families were seeking, the process has met its intended goal over the years. Approximately 15% of petitions have been appealed, and less than one quarter of those resulted in a different outcome.

Like every other qualitative evaluation tool, though, the petition transfer process can and should be improved. This is an important time to enhance to petition process, if it will be the only mechanism for transfer into neighborhood schools and may result in additional volume of requests. The types of improvements that will be most beneficial are:

- New staff positions in ETC to manage anticipated petition transfer requests and support families learning about this and other transfer changes
 - We estimate that there would be 500 additional petition transfer requests received in the ETC each year. An additional .5 placement specialist position is warranted to support this additional volume, and to ensure that the rest of the families who petition receive a full and fair review of their request. If approved, this position would be opened immediately.
 - The ETC receives a high volume of calls and e-mails every day, and that amount would be expected to increase as families seek information about new transfer rules and seek petition transfers for their students. Returning a third clerk to the ETC would ensure that phones are answered promptly, and callers are given ample time to learn new information, ask questions and share concerns. With the right skill set, the new clerk could also assist our department by maintaining the website with up-to-date information and supporting our data analyst in preparing and running reports. If approved, this position would be opened immediately.

- For both of these positions, we would give preference to skilled applicants who can expand the department's ability to communicate in Vietnamese, Chinese or Somali.
- Training, coaching and support for existing staff
 - Existing ETC staff have participated in district equity trainings for four years. Each person has completed Beyond Diversity training, and participated in Courageous Conversations About Race book studies and professional development about applying the district's racial equity lens tool to decisions. Staff is eager for more training opportunities, such as mindful listening techniques and more opportunities to practice using the racial equity lens. PPS Equity department staff are the best available source for these trainings, but additional, non-PPS trainings or workshops with culturally-specific community partners would be beneficial, as well.
 - In addition to direct trainings, all staff would benefit from one-on-one coaching, allowing time to discuss interactions with parents and reflecting on ways to improve their ability to be respectful and supportive of all families, particularly those from historically underserved races. Presently, PPS Equity staff have limited capacity to fulfill this role, so external support will be needed.
 - Additional training with school-based staff, central office department staff, community partners and others who work directly with families will be provided on a regular basis.
- Technical upgrades
 - The petition form will be updated and additional materials will be prepared to help families understand the process and the criteria used in transfer decisions, including how space availability is determined at requested schools. All information will be available in six languages.
 - According to IT staff, the School Choice software system is now at the end of its lifecycle. A newly designed system is under consideration for development in the 2015-16 school year. The project is in early development now, with an initial estimated cost of \$300,000. The project is necessary to ensure the continuation of a secure online application and a functional lottery engine.
 - The full software overhaul would be needed even if there were no changes to the transfer system at this time. In the immediate term, there are programming changes necessary to bring the software system rules in alignment with the proposed transfer policy changes, as well as with recent state legislation regarding interdistrict transfers. The estimated cost for immediate software programming is \$20,000-\$50,000.
 - Additional programming may be needed to create a set of reporting tools to easily share results of the transfer process with school and central staff as well as the School Board.
- Additional Family Communications
 - The Enrollment & Transfer Department has worked closely with the Community Involvement & Public Affairs (CIPA) Department to produce and distribute detailed information about school options, available choices, and how to access them each year leading up to the open enrollment period. These materials are for current and incoming families and are translated in all supported PPS languages. We plan on working with

CIPA to review and improve all communications materials, increase the frequency and accessibility of information – particularly about the lottery – and add modern preferred communications tools such as informational videos and an active presence on social media.

Section II: SCENARIOS FOR ESTIMATING IMPACT OF FOCUS OPTION LOTTERY CHANGES

The Superintendent has proposed revising lottery preferences for focus option schools. In the current lottery order, co-enrolled sibling applicants have higher preference than other applicants, and a small weight is in place to increase the lottery number for students who qualify for free or reduced-price meals. SACET noted that the weight has not been sufficient to help bring the socio-economic make-up of some focus option schools to the level of the district average. They proposed changing the weight to a preference equal to the district average for students who qualify for free and reduced-price meals (currently 45%) and placing that preference above the preference for co-enrolled siblings.

Models shown at recent Board meetings have illustrated the estimated impact on school enrollment if the proposed order had been in place over the past several years with the same applicant pool. Board members have asked for additional models estimating 1) the potential impact if sibling preference were higher than the preference for students who qualify for free and reduced-price meals and 2) the potential impact in the future if there were higher numbers of sibling applicants or low-income applicants (children who qualify for free or reduced-price meals or Head Start pre-kindergarten). The following three models attempt to address those requests.

The first version of Scenario A (attached) was presented at the Board worksession on December 2. It illustrates the proportion of transfer slots at six schools over the past three lottery cycles that would have been available for low-income and sibling applicants. Version II of Scenario A shows the estimated results over the past three lottery cycles if the preference for applicants who qualify as low income was below the preference for co-enrolled siblings.

Note that the model focuses on entry grade slots at focus options, and does not include Sunnyside Environmental School because of the very low number of slots available at kindergarten. Richmond slots are based on past Kindergarten and Pre-K openings. The number of Richmond will be different in 2015, as the Pre-K program is phasing out.

In both versions of this model, the 45% maximum preference for students who qualify as low-income would have resulted, on average, in six low-income applicants being denied admission through this preference. In Version I, one co-enrolled sibling over the three year span would have been denied admission, unless an additional slot was added for the student. In Version II no siblings would have been denied admission.

Scenario B is a speculative model that assumes applicants equal to 60% of available slots in each preference group. The model was applied to the same six schools (slot estimate for Richmond is based on 4 K classrooms at 26 students per class), and again is split into two versions, the difference being the order of preference.

Version I assumes 45% of slots are offered to students who qualify as low-income, which leaves a total of 60 low-income applicants unplaced at the six schools. The remaining 55% of slots are allocated to students with sibling preference or other applicants, which leaves 21 sibling applicants unplaced. In total, 81 students who have preference in one of the two categories do not receive preferred approval at the six schools, 74% are students with low-income preference and 26% are students with sibling preference.

Version II assumes that applicants with sibling preference are placed first with no limits, followed by applicants with low-income preference. Since this scenario has the same number of applicants in each preference group, equal to 60% of lottery slots, then the maximum number of slots for applicants with low-income preferences is 40% at each school. The result is that all applicants with co-enrolled sibling preference are approved, and 100% of denials for students with preference (81 students) are those with low-income preference.

Attachments:

3 year petition transfer summary

2012-13 petition requests and results with demographics

Petition reasons chart

Petition process flowchart

Lottery scenarios A & B

THREE-YEAR SUMMARY OF PETITION REASONS

		TRANSFER YEAR		
Petition Reason Category	Reason Description	2013-14	2012-13	2011-12
Sibling	Co-enrolled sibling	213	274	227
	Special Education placement	6	4	3
Subtotal		219	278	230
School Location	Transportation	189	223	295
	Transportation, relatives	14	10	11
Subtotal		203	233	306
Child care	Closer to provider	84	95	96
	No on-site daycare @ school	8	4	7
Subtotal		92	99	103
Student Safety	Physical risk to child	141	87	123
	Health/safety concerns	78	72	64
Subtotal		219	159	187
Student Continuity	Remain with peer group	116	92	80
Subtotal		116	92	80
Student Programmatic Interest	Program interest	439	417	360
	Different Learning Environment	58	102	58
Subtotal		497	519	418
History with requested school	Prior experience with school	48	55	46
Subtotal		48	55	46
Established transfer priorities	Return to neighborhood	147	209	165
	Specific transfer preferences	19	128	39
	Confusion about transfer process	9	12	6
Subtotal		175	349	210
Total Petition Reasons		1569	1784	1580
Total Petition Requests (Residents only)		1159	1414	1169

Note:

Resolution transfers for the 2012-13 were substantially higher due to school YWA closure & Humboldt consolidation.

PETITION TRANSFER PROCESS REASONS AND FOLLOW-UP

REASON PROVIDED		SUPPORTING EVIDENCE/FOLLOW-UP		
Petition Reason Category	Petition Reason Description	ETC	Requested school	Neighborhood/ Current school
Sibling	A. A co-enrolled sibling will attend the requested school next year	Verify co-enrolled sibling status and attendance history	Determine whether space is available	
School location	A. I can access the requested school more easily than my neighborhood or current school (specify type of transportation)	Verify transportation hardship	Determine whether space is available	Offer information about family's past experience accessing school
	B. The requested school is near the school where other family members attend, and all children travel together	Verify reason for other students to travel together	Determine whether space is available	Offer information about family's past experience accessing school
Child care	A. The requested school is closer to my child care provider (specify provider)	Verify child care arrangements; learn about child care offered through neighborhood school	Determine whether space is available, verify (if necessary) that child care provider transports students to this school	Offer information about child care available at school or within neighborhood
	B. My neighborhood school does not offer on-site child care, so I am seeking a school with this service	Verify child-care program availability	Determine whether space is available, including space in child care program	Confirm no on-site childcare options exist
Student Safety	A. The requested school is located away from a direct physical risk to my child that is present at the current/neighborhood school	Verify risk and school efforts to mitigate (restraining order, police report, school incident report or other evidence)	Determine whether space is available, verify that risk will be significantly diminished at this location	Offer information about family's past experience, efforts to mitigate risk

PETITION TRANSFER PROCESS REASONS AND FOLLOW-UP

Student Safety	B. My child has a specific health or safety need that cannot be met at our current/neighborhood school	Verify the existence of the specific health or safety need	Determine whether space is available, verify that student's specific need could be met	Verify that student's specific need could not be met
Student Continuity	My child will be able to remain with a peer group at the requested school, which is important for his/her educational and/or emotional well-being	Verify that student's educational or emotional well-being is related to a specific group of peers	Determine whether space is available, verify that student would be able to remain with peers	Offer information about student's past experience with peer group
Student programmatic interest or need (immersion, hands-on learning, dance, etc)	A. My child has a specific programmatic interest necessary for him/her to reach highest educational potential	Verify the child's programmatic history	Determine whether space is available, verify that student would be able to access requested content	Offer information about student's past programmatic experience
History with requested school	A. I have prior experience with the requested school that causes me to believe my child will be successful there	Verify prior experience (older sibling or parent attended, affiliation with cultural group, etc)	Determine whether space is available, verify prior experience	Offer information about student's past experience
Established transfer priorities	A. Request is to return to the neighborhood school following attendance at a transfer school	Verify neighborhood	Determine whether space is available (outside of transfer cycle only)	Offer information about student's past experience
	B. Specific transfer preference	Verify eligibility	Determine whether space is available (outside of transfer cycle only)	
	C. Confusion/difficulty with lottery or other transfer process	Verify application problem	Determine whether space is available (outside of transfer cycle only)	Offer information about student's past experience

2012-13 Petition Summary

		TOTAL PETITION POPULATION N = 1171*	
Race/Ethnicity		Count	%
	White	513	44%
	Student of Color	658	56%
Socio-Economic Status		Count	%
	Qualified for F/R Meals	742	63%
	Did not qualify for F/R Meals	429	37%

PETITION APPROVALS N = 728 (62% of all requests)	
Count	%
321	44%
407	56%
457	63%
271	37%

PETITION DENIALS** N = 443 (38% of all applicants)	
Count	%
192	41%
251	59%
285	66%
158	34%

		TOTAL APPEALS POPULATION N = 72***	
Race/Ethnicity		Count	%
	White	42	58%
	Student of Color	30	42%
Socio-Economic Status		Count	%
	Qualified for F/R Meals	41	57%
	Did not qualify for F/R Meals	31	43%

APPEAL APPROVALS N = 16 (22% of all appeals)	
Count	%
9	56%
7	44%
Count	%
11	69%
5	31%

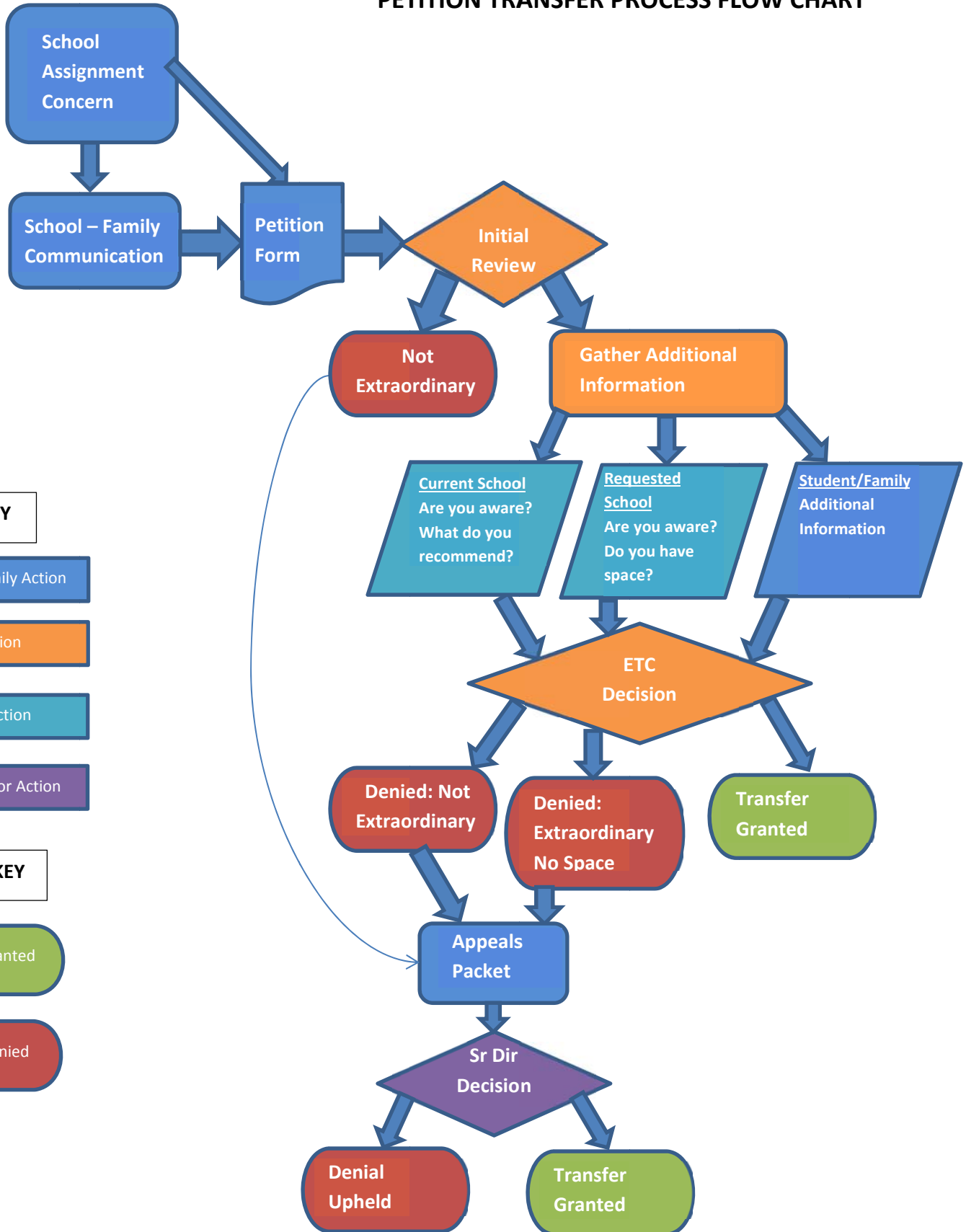
APPEAL DENIALS N = 56 (78% of all appeals)	
Count	%
33	41%
23	59%
Count	%
30	66%
26	34%

*1414 petitions on file, but demographic matches for 1171 students

**includes waitlisted and approved to lower choices

***16% of all denials, 6% of all petition requests

PETITION TRANSFER PROCESS FLOW CHART



PROCESS KEY

- Student / Family Action
- ETC Action
- School Action
- Senior Director Action

OUTCOME KEY

- Transfer Granted
- Transfer Denied

Scenario A: Estimated Impact of Proposed Lottery Preferences, Based on Entry Grade Transfers in Past Three Years at Six Focus Options

Version I Order of preference: Low Income @ 45% first, then siblings

School	AVERAGE SLOTS AND APPLICANTS			POSSIBLE RESULTS FOR APPLICANTS WITH LOW INCOME PREFERENCE			POSSIBLE RESULTS FOR APPLICANTS WITH SIBLING PREFERENCE		
	Average entry-grade Slots per year	Maximum slots for low-income preference (45%)	Maximum slots for siblings preference (55%)	Average number of low-income applicants	% of slots	Average number of low-income applicants not placed (applicants-max slots)	Average number of sibling applicants	% of slots	Average number of sibling applicants not placed (applicants-max slots)
Buckman	20	9	11	11	55%	-2	11	55%	0
CSS	50	22	28	26	52%	-4	21	42%	0
Odyssey	25	11	14	2	10%	0	8	32%	0
Richmond	114	51	63	17	15%	0	47	41%	0
Winterhaven	24	11	13	7	27%	0	14	57%	1 sibling would not have been placed in one of three years
daVinci	150	68	82	48	38%	0	13	9%	0
Total	383	172	211	111		-6	114		<1

Version II Order of preference: Siblings first, then low income @ 45% maximum

School	AVERAGE SLOTS AND APPLICANTS			POSSIBLE RESULTS FOR APPLICANTS WITH SIBLING PREFERENCE			POSSIBLE RESULTS FOR APPLICANTS WITH LOW-INCOME PREFERENCE		
	Average Entry-Grade Slots per year	Maximum slots for siblings preference (No limit)	Maximum slots for low-income preference (45%)	Average number of sibling applicants	% of slots	Average number of sibling applicants not placed (applicants-max slots)	Average number of low-income applicants	% of slots	Average number of low-income applicants not placed (applicants-max slots)
Buckman	20	20	9	11	55%	0	11	55%	-2
CSS	50	50	22	21	42%	0	26	52%	-4
Odyssey	25	25	11	8	32%	0	2	10%	0
Richmond	114	114	51	47	41%	0	17	15%	0
Winterhaven	24	24	11	14	57%	0	7	27%	0
daVinci	150	150	68	13	9%	0	48	38%	0
Total	383	383	172	114		0	111		-6

Scenario B: Estimated impact of proposed lottery preferences, based on applicants with in each preference category equal to 60% of slots

Version I Order of preference: Low Income @ 45% first, then siblings

School	SLOTS AND APPLICANTS			POSSIBLE RESULTS FOR APPLICANTS WITH LOW-INCOME PREFERENCE			POSSIBLE RESULTS FOR APPLICANTS WITH SIBLING PREFERENCE		
	Entry-grade slots per year	Maximum slots for low-income applicants (45%)	Maximum slots for sibling applicants (55%)	Applicants who qualify as low-income	% of slots	Low-income applicants not placed (applicants-max slots)	Applicants who qualify as co-enrolled siblings	% of slots	Sibling applicants not placed (applicants-max slots)
Buckman	20	9	11	12	60%	-3	12	60%	-1
CSS	50	22	28	30	60%	-8	30	60%	-2
Odyssey	25	11	14	15	60%	-4	15	60%	-1
Richmond	108	48	60	68	60%	-20	68	60%	-8
Winterhaven	24	11	13	14	60%	-3	14	60%	-1
daVinci	150	68	82	90	60%	-22	90	60%	-8
Total	377	169	208	229		-60	229		-21

Version II Order of preference: Siblings first, then low income @ 45% maximum

School	SLOTS AND APPLICANTS			POSSIBLE RESULTS FOR APPLICANTS WITH SIBLING PREFERENCE			POSSIBLE RESULTS FOR APPLICANTS WITH LOW-INCOME PREFERENCE		
	Entry-Grade slots per year	Maximum slots for sibling applicants (no limit)	Maximum slots for low-income applicants (45%)	Applicants who qualify as co-enrolled siblings	% of slots	Sibling applicants not placed (applicants-max slots)	Applicants who qualify as low-income	% of slots	Low-income applicants not placed (applicants-slots remaining after sibs)
Buckman	20	20	9	12	60%	0	12	60%	-4
CSS	50	50	22	30	60%	0	30	60%	-10
Odyssey	25	25	11	15	60%	0	15	60%	-5
Richmond	108	108	48	68	60%	0	68	60%	-28
Winterhaven	24	24	11	14	60%	0	14	60%	-4
daVinci	150	150	68	90	60%	0	90	60%	-30
Total	377	377	172	229		0	229		-81



Board of Education Informational Report

MEMORANDUM

Date: December 4, 2014

To: Members of the Board of Education

From: Jon Isaacs, Chief of Communications & Public Affairs
Richard Gilliam, Director of School-Family Partnerships

Subject: Marketing and Grassroots Outreach support for Focus Option Schools

Currently, marketing of focus option schools is currently focused on Benson Polytechnic and Jefferson Middle College as part of high school system design starting in 2011. District-level marketing of focus option schools at the K-8 level is currently limited to a brochure that promotes open house dates for all schools district-wide and focus option schools are not encouraged to engage in their own marketing. Limited marketing is certainly one – though not the only – contributor to the general lack of racial, geographic and economic diversity in focus option schools. PPS, through the Community Involvement & Public Affairs (CIPA) Department and School-Family Partnerships staff, have built and implemented successful marketing and grassroots outreach campaigns for many of Portland’s high schools and neighborhood schools in response to board-approved changes such as high school system design and enrollment balancing. We envision providing similar support to focus options if the Superintendent’s recommendations are approved. This memo outlines the elements of these marketing and outreach efforts.

We have provided you several examples of marketing materials that we have strategically produced for PPS schools. These materials are translated into supported languages and printed. It should be noted that, for the most part, these marketing campaigns were designed for neighborhood schools to attract students from their catchment area that may be considering transferring to another school. We envision that we will be able to re-direct some of these resources to support focus option schools as neighborhood-to-neighborhood transfers slowly decline.

Step 1 – Creative Collaboration to Building the School Story

The first step of any school marketing campaign developed by CIPA and Office of School-Family Partnerships is to hold workshops with the school leadership, teachers and parents leaders to draw out what they appreciate most about their school, and what they believe families should know about it. This may include specific programs, overall academic success, specific high quality teachers, school culture, or annual school events. For focus options, the academic focus of the school will obviously be a big part of the story.

Following this collaborative work, CIPA will work to arrange school tours for leaders from communities of color and other historically underserved communities followed by focus group style discussions about the strengths and weaknesses of each focus option school from the perspective of underrepresented families.

Using this input, the CIPA writing, design and production staff (currently 3 people for all of PPS) will develop draft materials including brochures, fact sheets and posters in multiple languages. Translation will be critical for focus options as the focus of these efforts will be outreach to historically underserved communities. We have included several examples of current and past marketing materials. The CIPA video production staff can also produce short promotional videos for focus option schools.

These materials will go through a collaborative editing process with the school community, with the input from PPS community agents and School-Family Partnership staff who have deep experience working with historically underserved communities to ensure they will connect with the intended audiences.

In addition to helping focus option school develop and tell their individual story, we will continue to include focus option schools in our general school choice family information materials.

Lastly, PPS CIPA will design and sponsor targeted advertising campaigns targeted at underrepresented communities. This campaign will focus on culturally specific newspapers, radio and social/mobile media in multiple languages.

In general, this work will become stronger and more effective over time as PPS conducts the periodic reviews of focus option schools and their missions (individually and collectively) become clearer and more articulate.

Step 2 – Outreach to Head Start Families & Communities of Color

The purpose of our outreach campaigns is to dramatically increase word of mouth and awareness about the opportunities at focus option schools among the target audience, in this case head start families and other historically underserved communities. We know that the biggest driver of decisions to enter the focus option lottery is word of mouth from peers and friends. That is exactly what these outreach efforts will be designed to generate.

The specific measurable goal is to recruit a minimum of 100 families to provide their information on interest forms. The interest forms, a classic community organizing tool, have proven to be highly successful in the work the PPS Dual Language Immersion (DLI) staff and community agents to build the enrollments for the recently launched DLI programs. It allows one-on-one follow-up and conversation following the group events.

We develop the outreach plans using a similar collaborative process. School-Family Partnerships will work with the parent community and school administration to recruit spokespeople from the families and school staff that effectively connect with historically underserved communities. For example, the most effective messenger for head start families will be the head start parents who are already attending focus options schools.

Additionally, the Office of School-Family Partnerships will reach out to community partners representing communities of color to build events that expose head start families and families from historically underserved communities to the opportunities at focus option schools. These events are held in culturally relevant and accessible locations and have full services such as translation and child care. The most important factor for this outreach is that focus option schools, with the right spokespeople, go to the communities rather than inviting them to the school. The “ask or “take away” from these meetings will be the families signing interest forms.

Following these events, we will work with interested community partners to co-host open houses at focus options schools using the interest forms to do one-on-one follow-up and recruitment for open houses.

Action	Month	Stakeholders	PPS Staff Lead	Measurable/Specific Outcome
Marketing Creative Workshops	April – June	Parents, principals, teachers	CIPA	Develop Creative concepts for marketing campaigns
FO School Tours for community leaders	April – June	Leaders from historically underserved communities, parents, principals, teachers	CIPA, Family Engagement	Focus groups give specific feedback about accessibility & climate of school – strengths & weaknesses
Develop Marketing Campaign	September – October	CIPA	CIPA	Marketing materials developed and edited with school community
Launch Marketing Campaign	October	Target Audiences – Head Start families, communities of color	CIPA	Impressions delivered & materials fully distributed to communities and schools
Recruit & train spokespeople	September – October	Parents & Principals	CIPA & Family Engagement	Messaging developed and outreach team trained
Schedule, Organize & Hold Family Information Sessions	November – January	Parents, Principals, Families of Color, Head start families, Community Partners	Family Engagement Community Agents	# of families who attend & sign interest forms
Co-Hosted Open Houses	December – January	Parents, Principals, Families of Color, Head start families, Community Partners	CIPA & Family Engagement	# of families who attend open houses

Additional Communication for Enrollment & Transfer Office

The Enrollment & Transfer Department has worked closely with the Community Involvement & Public Affairs (CIPA) Department to produce and distribute detailed information about school options, available choices, and how to access them each year leading up to the open enrollment period. These materials are for current and incoming families and are translated in all supported PPS languages. We plan on working with CIPA to review and improve communications materials, increase the frequency and accessibility of information – particularly about the lottery – and add modern preferred communication tools such as informational videos and an active presence on social media.

Needed Additional Staff

The Community Involvement & Public Affairs Department currently has only one writing and production staff for family and community communications. The increase in marketing and family communications in support of these efforts will require the addition of a writing and production coordinator. The full cost for this position is approximately \$72,000.



Board of Education Informational Report

MEMORANDUM

Date: 12.5.14

To: Members of the Board of Education

Subject: 2014-15 Budget Requests Based on Proposed Enrollment and Transfer Policy

Below, please find the requests for the January budget amendment in order to implement the proposed changes to the Enrollment and Transfer Policy in order to align with the Racial Educational Equity Policy.

Budget Request	2014-15 Budget (6 months)	Notes
<u>Focus Option Review Process</u> See attached Educational Options Policy	\$50,000	Coordination of regular review of focus options, including option for replication.
<u>Enrollment and Transfer Center Staff Support</u> 1.0 Clerk .5 Specialist	\$50,000	Support enhanced petition process
<u>Training and Coaching for Staff in Enrollment and Transfer Center</u>	\$10,000	<u>To Improve Cultural Awareness and Skill in the Petition Transfer Process</u>
<u>Marketing and Grassroots Outreach Support for Focus Option Schools</u>	\$50,000	Writing and production coordinator
<u>Technical Upgrades for Lottery System</u>	\$20,000-50,000	

Total for January Amendment **\$260,000**

Please note, staff support will be ongoing costs and will be annualized for 2015-16 budget.



Board of Education Informational Report

MEMORANDUM

Date: 12/9/2014

To: Members of the Board of Education

From: Sean L. Murray, Chief Human Resources Officer

Subject: Portland Association of Teachers (PAT) Workload Committee Quarterly Update

As previously discussed at the September 2, 2014 Board Retreat, the following is provided as a quarterly update of the PAT Workload Committee.

Background:

As part of the 2013-16 Collective Bargaining Agreement (Article 5, section 10) between the District and PAT, a workload committee has been established to consider options for eliminating aspects of the current workload for professional educators. The Workload Committee is comprised of PAT members and district administrators that meet to review workload concerns and forward recommendations to the Assistant Superintendent for School Performance for relief consideration.

Meetings:

The committee meets twice a month, generally the first Wednesday of each month from 8:00 – 11:00 AM and the third Thursday of each month from 4:00 – 7:00 PM

Update:

Since the last Workload Committee update presented to the School Board, the “Professional Educator Workload Reporting Form” for professional educators to submit requests for review of workload issues is active and available on-line for electronic submission. This form can be accessed by PAT members from both the PPS and the PAT web sites. To date, the Workload Committee has received eight (8) requests for individual workload review. The requests include concerns about workload in Special Education, the loss of Synergy leads, Medicaid administrative billing, and support for classrooms with large numbers of students and/or students in the process of being evaluated for special services.

The District and the Association have executed a Memorandum of Understanding (MOU) to increase the number of committee members from PAT and PPS Administration to a total of twelve, six from each team, and to change to Assistant Superintendent for School Performance from Chief Academic Officer where referenced in Article 5 of the contract.

While the Committee has yet reached the point of making formal recommendations, it supports the following concepts for consideration:

1. When projects, such as major system or IT rollouts, are submitted for approval, the project should be required to include a plan for both implementation and ongoing support. Along these lines, the Committee supports IT's request for continued funding of Synergy leads or other ongoing support for Synergy in the schools.
2. Coordination of new initiatives between departments within the district, so that fewer new processes and initiatives are being rolled out at one time and consideration of where the new initiative fits within the district and what does it replace.
3. Ongoing funding for substitute coverage or other resources for teachers who are required to conduct one-on-one testing with students.



Board of Education Informational Report

MEMORANDUM

Date: 12/9/2014
To: Members of the Board of Education
From: Sean L. Murray, Chief Human Resources Officer
Subject: 2014-2015 PERS Bubble MOUs

For a number of years, the District and labor organizations representing district employees have annually entered into agreements to rehire employees who retire under PERS before the end of the school year to and allow them to work through the end of the work year, up to the maximum number of hours that PERS rules allow.

We have upgraded these agreements to make it clearer that a new employment relationship occurs when a retiree is rehired to perform existing bargaining unit work.

State law requires Board of Education approval of contracts involving the employment of school district employees. Copies of the proposed Memoranda of Understanding for each of our existing bargaining units are attached.

Re-Employment of Retirees

Memorandum of Understanding between Multnomah County School District #1J (District) and The Amalgamated Transit Union (ATU)

The purpose of this Memorandum of Understanding is to set forth the terms and conditions of employment for bargaining unit members ("Retirees") who retire under the Oregon Public Employee Retirement System ("PERS") on or after January 1, 2015 and who are members of the bargaining unit represented by ATU on the workday immediately prior to the Retiree's PERS retirement date, and who the District re-employs between the Retiree's PERS retirement date and June 30, 2015.

1. The Retiree:
 - a. Must have a PERS retirement date on or after January 1, 2015 and no later than June 1, 2015;
 - b. Must have submitted a written District Resignation Form ending District employment prior to the Retiree's PERS retirement date; *(Note: Under PERS rules the PERS retirement date is the first day of the month after an employee ends District employment. For example, if you end employment on the last contract day before Winter break, your PERS retirement date would be January 1st. If you end employment on January 1st, your PERS retirement date would be February 1st.)* and
 - c. Must declare in writing his/her request to begin a new employment relationship with the District as a Retiree in the Retiree's prior position through the end of the work year or June 30, 2015, whichever first occurs. This written notice must be submitted to the District as part of the District Resignation Form no later than thirty (30) calendar days before the PERS retirement date.
2. Payroll will report all earned sick leave to PERS.
3. A Retiree will be re-employed by the District in the position that the Retiree held on the Retiree's date of resignation only if all of the following conditions are met:
 - a. The employee elects to retire between January 1, 2015 and the end of the work year; and
 - b. The District decides to continue the Retiree's former position; and
 - c. There is no one on layoff status that is qualified for the position.
4. Any period of employment between January 1, 2015 and June 30, 2015 is a new employment relationship between the Retiree and the District as outlined below.

- a. A Retiree is expected to demonstrate reliable and regular attendance at work and meet all expectations of the assignment.
 - b. Pay and benefits for re-employed Retirees are set forth below.
 - i. Insurance coverage under the District’s medical/dental insurance for active employee insurance coverage will continue through July 31, 2015, if permitted by the terms of such insurance.
 - ii. Retiree to be paid at his/her pre-retirement rate of pay, less the 6% PERS pickup.
 - iii. Retiree will retain a day of sick leave for each month worked, beginning the first month after his/her retirement date, until the end of the work year or June 30, 2015 (whichever comes first), but not be eligible for any other paid leaves.
5. The new employment relationship will end on the last day of the work year in June 2015. In no event will the Retiree’s re-employment extend beyond June 30, 2015.
6. Promise of employment as a Retiree after the end of the 2014-15 school year is neither stated nor implied.

For the District

For the ATU

By: _____
Sean L. Murray, CHRO

By: _____
Bruce Hansen, President

Re-Employment of Retirees

Memorandum of Understanding between Multnomah County School District #1J (District) and The District Council of Unions (DCU)

The purpose of this Memorandum of Understanding is to set forth the terms and conditions of employment for bargaining unit members ("Retirees") who retire under the Oregon Public Employee Retirement System ("PERS") on or after January 1, 2015 and who are members of the bargaining unit represented by DCU on the workday immediately prior to the Retiree's PERS retirement date, and who the District re-employs between the Retiree's PERS retirement date and June 30, 2015.

1. The Retiree:
 - a. Must have a PERS retirement date on or after January 1, 2015 and no later than June 1, 2015;
 - b. Must have submitted a written District Resignation Form ending District employment prior to the Retiree's PERS retirement date; *(Note: Under PERS rules the PERS retirement date is the first day of the month after an employee ends District employment. For example, if you end employment on the last contract day before Winter break, your PERS retirement date would be January 1st. If you end employment on January 1st, your PERS retirement date would be February 1st.)* and
 - c. Must declare in writing his/her request to begin a new employment relationship with the District as a Retiree in the Retiree's prior position through the end of the work year or June 30, 2015, whichever first occurs. This written notice must be submitted to the District as part of the District Resignation Form no later than thirty (30) calendar days before the PERS retirement date.
2. Payroll will report all earned sick leave to PERS.
3. A Retiree will be re-employed by the District in the position that the Retiree held on the Retiree's date of resignation only if all of the following conditions are met:
 - a. The employee elects to retire between January 1, 2015 and the end of the work year; and
 - b. The District decides to continue the Retiree's former position; and
 - c. There is no one on layoff status that is qualified for the position.
4. Any period of employment between January 1, 2015 and June 30, 2015 is a new employment relationship between the Retiree and the District as outlined below.

- a. A Retiree is expected to demonstrate reliable and regular attendance at work and meet all expectations of the assignment.
 - b. Pay and benefits for re-employed Retirees are set forth below.
 - i. Insurance coverage under the District’s medical/dental insurance for active employee insurance coverage will continue through July 31, 2015, if permitted by the terms of such insurance.
 - ii. Retiree to be paid at his/her pre-retirement rate of pay, less the 6% PERS pickup.
 - iii. Retiree will retain a day of sick leave for each month worked, beginning the first month after his/her retirement date, until the end of the work year or June 30, 2015 (whichever comes first), but not be eligible for any other paid leaves.
5. The new employment relationship will end on the last day of the work year in June 2015. In no event will the Retiree’s re-employment extend beyond June 30, 2015.
6. Promise of employment as a Retiree after the end of the 2014-15 school year is neither stated nor implied.

For the District

For the DCU

By: _____
Sean L. Murray, CHRO

By: _____
Pat Christensen , President

Re-Employment of Retirees

Memorandum of Understanding between Multnomah County School District #1J (District) and

Service Employees International Union Local 503

School Employees Union Local 140 (SEIU)

The purpose of this Memorandum of Understanding is to set forth the terms and conditions of employment for bargaining unit members ("Retirees") who retire under the Oregon Public Employee Retirement System ("PERS") on or after January 1, 2015 and who are members of the bargaining unit represented by SEIU on the workday immediately prior to the Retiree's PERS retirement date, and who the District re-employs between the Retiree's PERS retirement date and June 30, 2015.

1. The Retiree:
 - a. Must have a PERS retirement date on or after January 1, 2015 and no later than June 1, 2015;
 - b. Must have submitted a written District Resignation Form ending District employment prior to the Retiree's PERS retirement date; *(Note: Under PERS rules the PERS retirement date is the first day of the month after an employee ends District employment. For example, if you end employment on the last contract day before Winter break, your PERS retirement date would be January 1st. If you end employment on January 1st, your PERS retirement date would be February 1st.)* and
 - c. Must declare in writing his/her request to begin a new employment relationship with the District as a Retiree in the Retiree's prior position through the end of the work year or June 30, 2015, whichever first occurs. This written notice must be submitted to the District as part of the District Resignation Form no later than thirty (30) calendar days before the PERS retirement date.
2. Payroll will report all earned sick leave to PERS.
3. A Retiree will be re-employed by the District in the position that the Retiree held on the Retiree's date of resignation only if all of the following conditions are met:
 - a. The employee elects to retire between January 1, 2015 and the end of the work year; and
 - b. The District decides to continue the Retiree's former position; and
 - c. There is no one on layoff status that is qualified for the position.
4. Any period of employment between January 1, 2015 and June 30, 2015 is a new employment relationship between the Retiree and the District as outlined below.

- a. A Retiree is expected to demonstrate reliable and regular attendance at work and meet all expectations of the assignment.
 - b. Pay and benefits for re-employed Retirees are set forth below.
 - i. Insurance coverage under the District’s medical/dental insurance for active employee insurance coverage will continue through July 31, 2015, if permitted by the terms of such insurance.
 - ii. Retiree to be paid at his/her pre-retirement rate of pay, less the 6% PERS pickup.
 - iii. Retiree will retain a day of sick leave for each month worked, beginning the first month after his/her retirement date, until the end of the work year or June 30, 2015 (whichever comes first), but not be eligible for any other paid leaves.
 - iv. Retirees performing coaching or advisor work that is covered by the Portland Association of Teachers/District collective bargaining agreement would be eligible for the pay described in that agreement. **Retirees should note that time spent performing extra work such as coaching counts as hours for the purpose of the PERS maximum hours.**
5. The new employment relationship will end on the last day of the work year in June 2015. In no event will the Retiree’s re-employment extend beyond June 30, 2015.
6. Promise of employment as a Retiree after the end of the 2014-15 school year is neither stated nor implied.

For the District

For the SEIU

By: _____
Sean L. Murray, CHRO

By: _____
Dianne Hibbard

By: _____
Heather Conroy

Re-Employment of Retirees

Memorandum of Understanding between Multnomah County School District #1J (District) and The Portland Federation of School Professionals (PFSP)

The purpose of this Memorandum of Understanding is to set forth the terms and conditions of employment for bargaining unit members ("Retirees") who retire under the Oregon Public Employee Retirement System ("PERS") on or after January 1, 2015 and who are members of the bargaining unit represented by PFSP on the workday immediately prior to the Retiree's PERS retirement date, and who the District re-employs between the Retiree's PERS retirement date and June 30, 2015.

1. The Retiree:
 - a. Must have a PERS retirement date on or after January 1, 2015 and no later than June 1, 2015;
 - b. Must have submitted a written District Resignation Form ending District employment prior to the Retiree's PERS retirement date; *(Note: Under PERS rules the PERS retirement date is the first day of the month after an employee ends District employment. For example, if you end employment on the last contract day before Winter break, your PERS retirement date would be January 1st. If you end employment on January 1st, your PERS retirement date would be February 1st.)* and
 - c. Must declare in writing his/her request to begin a new employment relationship with the District as a Retiree in the Retiree's prior position through the end of the work year or June 30, 2015, whichever first occurs. This written notice must be submitted to the District as part of the District Resignation Form no later than thirty (30) calendar days before the PERS retirement date.
2. Payroll will report all earned sick leave to PERS.
3. A Retiree will be re-employed by the District in the position that the Retiree held on the Retiree's date of resignation only if all of the following conditions are met:
 - a. The employee elects to retire between January 1, 2015 and the end of the work year; and
 - b. The District decides to continue the Retiree's former position; and
 - c. There is no one on layoff status that is qualified for the position.
4. Any period of employment between January 1, 2015 and June 30, 2015 is a new employment relationship between the Retiree and the District as outlined below.

- a. A Retiree is expected to demonstrate reliable and regular attendance at work and meet all expectations of the assignment.

 - b. Pay and benefits for re-employed Retirees are set forth below.
 - i. Insurance coverage under the District’s medical/dental insurance for active employee insurance coverage will continue through July 31, 2015, if permitted by the terms of such insurance.
 - ii. Retiree to be paid at his/her pre-retirement rate of pay, less the 6% PERS pickup.
 - iii. Retiree will retain a day of sick leave for each month worked, beginning the first month after his/her retirement date, until the end of the work year or June 30, 2015 (whichever comes first), but not be eligible for any other paid leaves.
 - iv. Retirees will not have access to professional growth or professional improvement funds.
 - v. Retirees performing coaching or advisor work that is covered by the Portland Association of Teachers/District collective bargaining agreement would be eligible for the pay described in that agreement. **Retirees should note that time spent performing extra work such as coaching counts as hours for the purpose of the PERS maximum hours.**
5. The new employment relationship will end on the last day of the work year in June 2015. In no event will the Retiree’s re-employment extend beyond June 30, 2015.
6. Promise of employment as a Retiree after the end of the 2014-15 school year is neither stated nor implied.

For the District

For the PFSP

By: _____
Sean L. Murray, CHRO

By: _____
Belinda Reagan, President

Re-Employment of Retirees

Memorandum of Understanding between Multnomah County School District #1J (District) and The Portland Association of Teachers (PAT)

The purpose of this Memorandum of Understanding is to set forth the terms and conditions of employment for PAT bargaining unit members ("Retirees") who retire under the Oregon Public Employee Retirement System ("PERS") on or after January 1, 2015 and who are members of the bargaining unit represented by Union on the workday immediately prior to the Retiree's PERS retirement date, and who the District re-employs between the Retiree's PERS retirement date and June 30, 2015.

1. The Retiree:
 - a. Must have a PERS retirement date on or after January 1, 2015 and no later than June 1, 2015;
 - b. Must have submitted a written District Resignation Form ending District employment prior to the Retiree's PERS retirement date; *(Note: Under PERS rules the PERS retirement date is the first day of the month after an employee ends District employment. For example, if you end employment on the last contract day before Winter break, your PERS retirement date would be January 1st. If you end employment on January 1st, your PERS retirement date would be February 1st.)* and
 - c. Must declare in writing his/her request to begin a new employment relationship with the District as a Retiree in the Retiree's prior position through the end of the work year or June 30, 2015, whichever first occurs. This written notice must be submitted to the District as part of the District Resignation Form no later than thirty (30) calendar days before the PERS retirement date.
2. Payroll will report all earned sick leave to PERS.
3. A Retiree will be re-employed by the District in the position that the Retiree held on the Retiree's date of resignation only if all of the following conditions are met:
 - a. The employee elects to retire between January 1, 2015 and the end of the work year; and
 - b. The District decides to continue the Retiree's former position; and
 - c. No internal transfer options are identified; and
 - d. There is no one on layoff status that is qualified for the position.

4. Any period of employment between January 1, 2015 and June 30, 2015 is a new employment relationship between the Retiree and the District as outlined below.
 - a. A Retiree is expected to demonstrate reliable and regular attendance at work and meet all expectations of the assignment.
 - b. Pay and benefits for re-employed Retirees are set forth below.
 - i. Insurance coverage under the District's medical/dental insurance for active employee insurance coverage shall continue through July 31, 2015, if permitted by the terms of such insurance.
 - ii. Retiree to be paid at his/her pre-retirement rate of pay, less the 6% PERS pickup.
 - iii. Retiree will retain a day of sick leave for each month worked, beginning the first month after his/her retirement date, until the end of the work year or June 30, 2015 (whichever comes first), but not be eligible for any other paid leaves.
 - iv. Retirees will not have access to professional growth or professional improvement funds.
 - v. The PAT/PPS collective bargaining agreement contains other pay or insurance provisions that apply. For example, Retirees performing coaching or advisor work that is covered by the Portland Association of Teachers/District collective bargaining agreement would be eligible for the pay described in that agreement. **Retirees should note that time spent performing extra work such as coaching counts as hours for the purpose of the PERS maximum hours.**
 - vi.
5. The new employment relationship will end on the last day of the work year in June 2015. In no event will the Retiree's re-employment extend beyond June 30, 2015.
6. Promise of employment as a Retiree after the end of the 2014-15 school year is neither stated nor implied.

For the District

BY: 
Sean L. Murray, CHRO

For the Association

BY:  11/18/2014
Marty Pavlik, UniServ Consultant

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

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December 9, 2014

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Other Items Requiring Board Action

The Superintendent RECOMMENDS adoption of the following items:

Numbers 4995 and 4996

RESOLUTION No. 4995

Acceptance and Approval of the Comprehensive Annual Financial Report, Reports to Management and Report on Requirements of the Single Audit Act and OMB Circular A-133

RECITALS

- A. The Board of Education is committed to accountability for how Portland Public Schools spends its tax dollars and other resources, and recognizes that transparency, accuracy, and timeliness in financial reporting are important components of financial accountability.
- B. The District Auditor, Talbot, Korvola & Warwick, LLP, has completed their independent audit of the financial reporting for the year ended June 30, 2014, and provides assurance that the District's accounting and reporting is in compliance with generally accepted accounting principles.
- C. The District has received awards in Excellence in Financial Reporting for 34 consecutive years from both the Government Finance Officers Association (GFOA) and the Association of School Business Officials (ASBO) and plans to submit the current financial reports for similar award consideration.

RESOLUTION

The Board of Education accepts and approves the Comprehensive Annual Financial Report, Reports to Management, and Report on Requirements of the Single Audit Act and OMB Circular A-133 of School District No. 1J, Multnomah County, Oregon for the fiscal year ended June 30, 2014, and authorizes the reports to be distributed to required state and federal agencies and filed for future reference.

Y. Awwad

RESOLUTION No. 4996

Re-Employment of Retirees

The authority to pay District employees who retire from Multnomah County School District #1J on or after January 1, 2015 and are re-employed to complete the 2014-15 school year on the terms presented to the Board and filed in the record of this meeting is granted.

S. Murray