

BOARD OF EDUCATION

Portland Public Schools
STUDY SESSION
October 6, 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** 6:00 pm
2. **UPDATE: BOUNDARY REVIEW** 6:20 pm
3. **ENROLLMENT FORECASTS AND PRELIMINARY ENROLLMENT PRIORITIES** 7:00 pm
4. **UPDATE: ACHIEVEMENT COMPACTS** 7:25 pm
5. **COORDINATED EARLY INTERVENING SERVICES** 8:30 pm
6. **BUSINESS AGENDA** 9:00 pm
7. **ADJOURN** 9:20 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: October, 2, 2014

To: Members of the Board of Education

From: Jon Isaacs, Senior Policy Adviser to the Superintendent
Judy Brennan, Enrollment Director

Subject: Update on District Wide Boundary Review & Enrollment Management

I. District-wide boundary review process background

In May, 2013 we provided an update to the board regarding district - wide boundary review. We informed you that there are many PPS schools operating outside target enrollment ranges. While the High School System Design process in 2009-2010 resulted in system-wide rules to balance enrollment between high schools, a similar effort has not occurred to address issues at the elementary, middle and K-8 levels. Past district efforts to prioritize and address the most urgent under- and over-enrollment issues have been seen as inequitable and overly narrow in scope. In response to these concerns, PPS has been preparing to undertake a district-wide boundary review (DBR) process.

Recognizing the daunting challenge a district wide boundary review effort presented we sought out a public service organization with proven experience and skills at assisting public agencies develop and complete successful complex public processes. We chose to enter into a partnership with the PSU Center for Public Service to co-manage the district wide boundary review process.

In June, 2014 the CPS delivered their phase one report to the board, which included input from over 100 stakeholders, reviewed large quantities of data, policies and historical documentation, and interviews with representatives of 14 other school districts. The report highlighted that, while PPS has well developed policy tools to address enrollment, ambiguity and inconsistency in policy prioritization and practices has led to confusion and mistrust. Furthermore, while the team found a high willingness among stakeholders for engagement, it was not uniform across the district, and there was considerable skepticism that the process will produce equitable results.

CPS offered three methods for a district-wide boundary review process, which varied in scope, scale, longevity and potential outcomes. The team suggested that PPS engage in a “bridge phase” to clarify goals, scope, roles and other important elements of the process before deciding on specific boundary review and community engagement methods.

II. Phase 2 Report on Internal Alignment with Process & Community Engagement Recommendations

Today, the CPS team delivers their phase 2 report – “*A Values, Growth, and Equity Strategy for District-wide Boundary Review.*” It reports on several areas where internal PPS leaders and stakeholders are aligned; clarifies the main rationale for undergoing district wide boundary review, and the issues that should be included in a district wide boundary review process; and recommends a short term and long term process, and recommends a bold new community engagement protocol for PPS.



Board of Education Informational Report

MEMORANDUM

Date: October 1, 2014

To: Members of the Board of Education

From: Judy Brennan, Enrollment Director

Subject: 2014-15 District-wide enrollment forecasts and preliminary enrollment priorities

This Memorandum provides an update on enrollment status and priorities for the coming year.

Each year, in accordance with policy 4.10.045-P, staff conducts an enrollment and capacity analysis of schools and programs and develops recommendations for enrollment priorities. A full report summarizing enrollment trends across the district will be available later in the fall, once all student counts are confirmed. In the meantime, and in acknowledgement of the upcoming district-wide boundary review process, this memo provides information about updated long-term enrollment forecasts and describes acute overcrowding conditions and potential short-term solutions at a small set of schools.

Enrollment forecasts for continued growth through 2028-29

Portland Public Schools commissions enrollment forecast reports every other year from the PSU Population Research Center. The most recent forecasts cover district-wide enrollment as well as grade and school specific population projections through the 2028-29 school year, and can be found at http://www.pps.k12.or.us/files/data-analysis/PSU-PPS_Report_1314.pdf. The report includes analysis of population, housing and enrollment trends in recent years, including the fact that PPS has experience six consecutive years of enrollment growth. This trend is expected to continue through the fifteen year timeframe of the enrollment forecasts, and to be slightly higher than that of the prior forecast series released in 2012.

A primary source of recent growth has been higher numbers of kindergarten students enrolling across the district. PSU demographers explain in the report that the increase can be attributed to more families choosing both to remain in Portland and to enroll their children in public school than in past decades. This larger population of young students is expected to matriculate to middle and high school grades in coming years, increasing enrollment substantially at those levels. The medium growth scenario anticipates 6,276 additional students attending PPS schools in 2028. The biggest change from 2013-14 enrollment is an additional 2,286 high school students (36% of all expected growth) in the year 2028.

Table 1: Medium growth enrollment forecasts by grade grouping 2013-14(actual) to 2028-29

Forecast Year	Grades K-2	Grades 3-5	Grades 6-8	Grades 9-12	K-12 Total
2013-14 actual	12,695	11,545	10,303	12,584	47,127
2018-19	12,507	12,272	11,423	13,765	49,967
2023-24	13,079	12,315	11,482	15,058	51,934
2028-29	13,633	13,006	11,894	14,870	53,403
Total enrollment increase	938	1,461	1,591	2,286	6,276
% of all change	15%	23%	25%	36%	

Enrollment growth is anticipated across all PPS clusters over the forecast timeframe, with average growth of 785 K-12 students for each cluster. Higher rates of increase are expected in Cleveland, Lincoln and Wilson cluster, with slightly lower than average rates at schools in Madison and Roosevelt clusters. See attached chart for enrollment forecasts by cluster of residence.

Staff will continue to examine updated enrollment forecasts and actual enrollment counts and provide additional analysis as part of subsequent enrollment balancing updates.

Enrollment issues requiring action for 2015-16 school year

PPS has partnered with the PSU Center for Public Service and National Policy Consensus Center to develop a district-wide boundary review process that is expected to result in more balanced enrollment across all schools. Most schools have sufficient flexibility in building capacity and programming to manage moderate growing pains during the one-to-two years of district-wide process. However a small number of “tier one” schools have already implemented numerous growth management strategies, and will likely need some additional degree of change to their building, program or enrollment to cope with acute over enrollment next year. Descriptions of overcrowding issues and options for relief are described below for the following tier one schools experiencing acute over-enrollment:

Beverly Cleary K-8/ACCESS
Chapman Elementary
Creative Science School and Head Start
Kelly Elementary, Russian Immersion and Head Start
Sitton Elementary and Head Start

An additional set of schools has experienced chronic enrollment challenges. While these “tier two” schools may not require significant changes to facilities, program or enrollment next year, they are likely to need some level of modification in the near future. Schools experiencing chronic enrollment challenges include Abernethy Elementary, Alameda Elementary, Astor K-8, Bridger K-8, Harrison Park K-8, Laurelhurst K-8, Skyline K-8, West Sylvan Middle and Lincoln High School.

Aside from individual schools or campuses, PPS also has an ongoing challenge of finding space for growing and changing programs, including siting new language immersion programs and supporting facility needs for Special Education and Multiple Pathways programs.

Tier One: Schools experiencing acute over-enrollment

1. Beverly Cleary K-8 and ACCESS Academy (Grant Cluster)

Beverly Cleary has grown at a rapid pace for the past five years. All potential on-site facility and program changes were made prior to the 2013-14 school year. However, the two campus school still did not have adequate space for all students. Last spring, following a community dialogue facilitated by the Beverly Cleary PTA, PPS took the community’s recommendation and

decided to move two grade levels to a third campus, Rose City Park, and share that school with the ACCESS Academy.

Beverly Cleary is now operating as a three-campus school, and significant resources have been allocated to handle the staffing, transportation, professional development and student support needs resulting from the unusual structure. Community members preferred this over other short-term options, but have continued to advocate for a long-term plan for the school. ACCESS Academy has been a willing partner in the co-location plan, but has its own growth goals and long-term space needs that must be addressed, as well.

Options for 2015-16 include maintaining the three campus structure and co-location plan with ACCESS, which would likely require changing the Beverly Cleary grade levels assigned to Rose City Park. A modular classroom addition does not provide enough relief to eliminate the need for three campuses, therefore is not under consideration at this time.

Another option is to draw a “starter” boundary for Rose City Park School, separate from Beverly Cleary, and open as a neighborhood school co-located with ACCESS Academy, beginning September 2015. If this option is selected, we will look to cause the least disruption for families and staff and allow time for a new site for ACCESS to be selected. Additional grade levels, feeder patterns and boundary areas would be a part of the district-wide boundary review process.

As boundary change is likely a necessary solution for the 2015-16 school year, we will task the soon-to-be-formed District-wide Boundary Review Advisory Committee (D-BRAC) with weighing the benefits and risks of boundary change options against other possible changes and making a recommendation to the Superintendent by February 2015. Any boundary changes would be brought to the Board for approval.

2. Chapman Elementary School (Lincoln Cluster)

Like Beverly Cleary, Chapman has grown consistently for five years from 544 to 646 students. A key difference, however, is that the Chapman boundary includes large tracts of former industrial space that continues to be redeveloped as multi-family housing, some of it designed specifically to house families with school-aged children. Enrollment forecasts show an increase from 701 to 836 K-5 students (19% growth) living in the Chapman boundary over the next four years, and even more students in later years.

Long-term solutions for Chapman may require opening or repurposing additional school capacity in nearby buildings. As this type of systemic decision will be made as part of a district-wide process, we are currently focused on short-term options that keep the school’s current configuration intact while awaiting the outcome of the larger process. Chapman may be able to continue for another year without major change, by consolidating classes at some grade levels. Additionally, we will continue to allow voluntary transfers from Chapman to nearby schools with available space, including Ainsworth and Forest Park. A small number of parents have exercised this option so far, and others may be willing if some level of transportation were provided by the district.

If neither of the options listed above prove feasible, more intensive changes could include installation of modular classrooms or a boundary change between Ainsworth and Chapman. Two modular classrooms could be installed at Chapman, however, the rooms would take up much needed outdoor space, and would not be sufficient to solve Chapman’s long-term space needs. While boundary change may not be a likely solution for the coming year, the superintendent may decide to ask the D-BRAC to advise on this option.

3. Creative Science School and Head Start (Madison Cluster)

Creative Science School (CSS) and Head Start have been co-located at the Clark building since 2008. CSS has been growing to two sections per grade level, and there will not be enough space next year for both programs to continue together at their current configurations. Head Start has already reduced the number of students it serves at the site, and CSS has shifted administrative and support staff to maximize classrooms for students.

Options for 2015-16 include relocating Head Start to another building, temporarily reducing the number of new students accepted to Creative Science School and locating two modular classrooms on the site. Program stability and integrity will be important factors in making a decision, particularly for the Head Start program which serves primarily low income families and many students of color.

4. Kelly Elementary School, Russian Immersion and Head Start (Franklin Cluster)

The Kelly campus houses three programs: Kelly neighborhood program, serving neighborhood students, Russian Immersion, serving neighborhood students as well as students from across PPS and other nearby districts, and a Head Start program serving low-income students from the region. The Russian Immersion program is growing by a classroom each year. All available spaces have been repurposed to prioritize classrooms for students, including relocating the SUN program food pantry. With the current program structure, Kelly will need two additional classrooms for Russian Immersion over the next two years.

Options to resolve overcrowding at Kelly include relocating or down-sizing either the Russian Immersion or Head Start programs. As Russian Immersion draws students from several school districts, it is possible that a neighboring district may be open to housing the program. (X% of students are from out of district) However, as both programs are specifically designed to support historically underserved students, any program moves or changes should be considered a last resort. Locating two modulars at the Kelly site is an option, as well. Boundary change is not a feasible solution, as most nearby schools are full and the relatively isolated population would have to travel further if assigned to other schools.

5. Sitton Elementary and Head Start (Roosevelt Cluster)

Sitton is a very small school in St. John's that is experiencing growth in its neighborhood program. The Head Start program located at the school has helped attract and retain students from families who might have made other school choices. Moreover, the program provides essential early education opportunities to a historically underserved population.

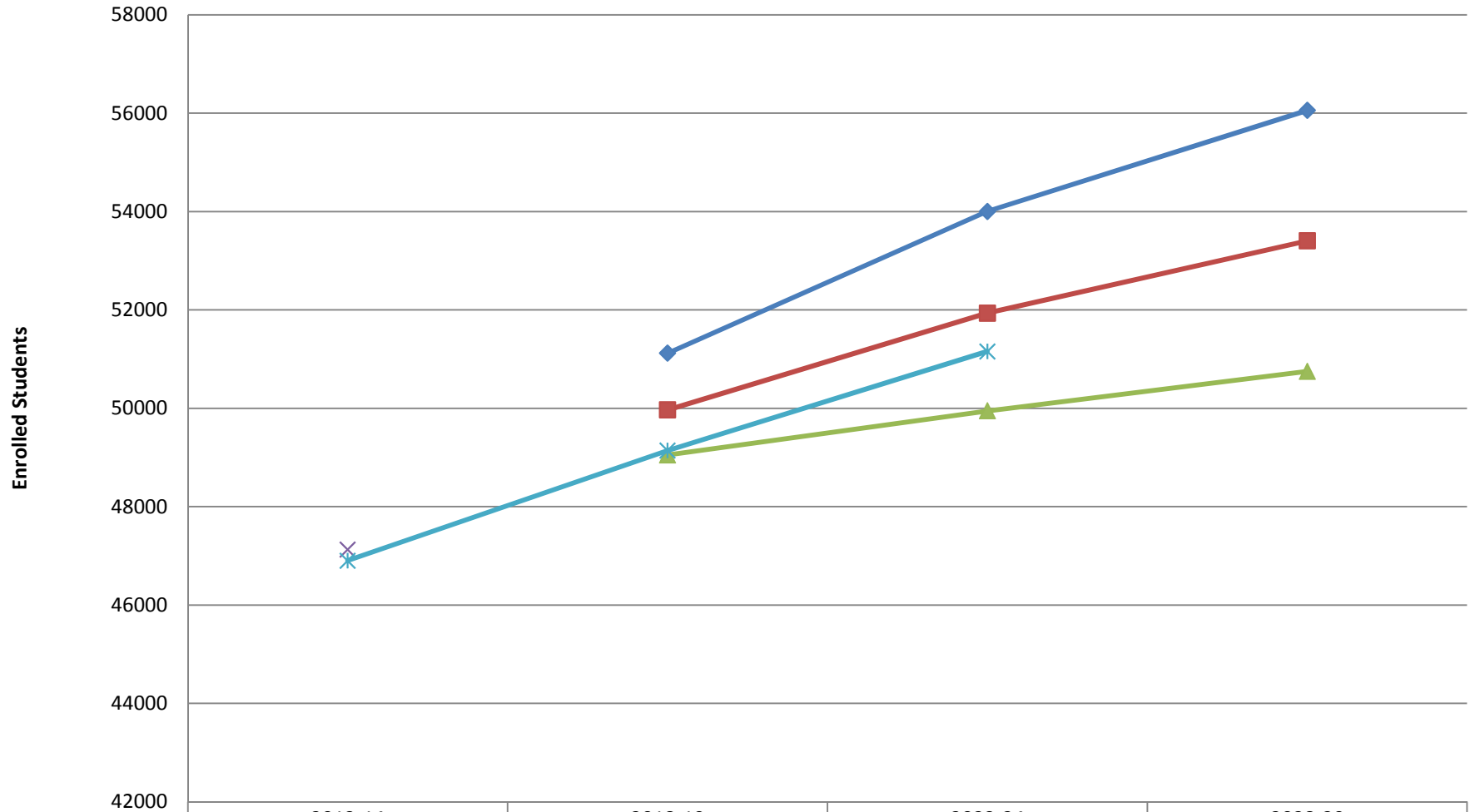
Sitton's building is small and cannot easily hold more students. Over the next two years, Sitton will need two additional classrooms to support its neighborhood program, Head Start and the two focus classrooms it hosts for students with exceptional disabilities. Options to resolve the space challenges at Sitton include relocating the Head Start or Special Education programs and locating two modular classrooms at the school. Boundary change is not a feasible option at this time, due to lack of space at nearby locations and increased travel times for Sitton families due to its location.

It should be noted that the Sitton Head Start was not merged into the recently opened Clarendon Early Learner Center, in part because of the increased travel time and other challenges that would impact the families who live closest to Sitton. As has been noted elsewhere, program integrity and stability will be primary factors in deciding which option to implement for 2015-16.

We will provide updates through the school year on these pressing enrollment issues, and on the progress of the new boundary review advisory committee. In the meantime, please contact me with any questions or concerns.

Attachments: Enrollment forecast charts by 1) model, 2) grade grouping and 3) K-12 high school cluster

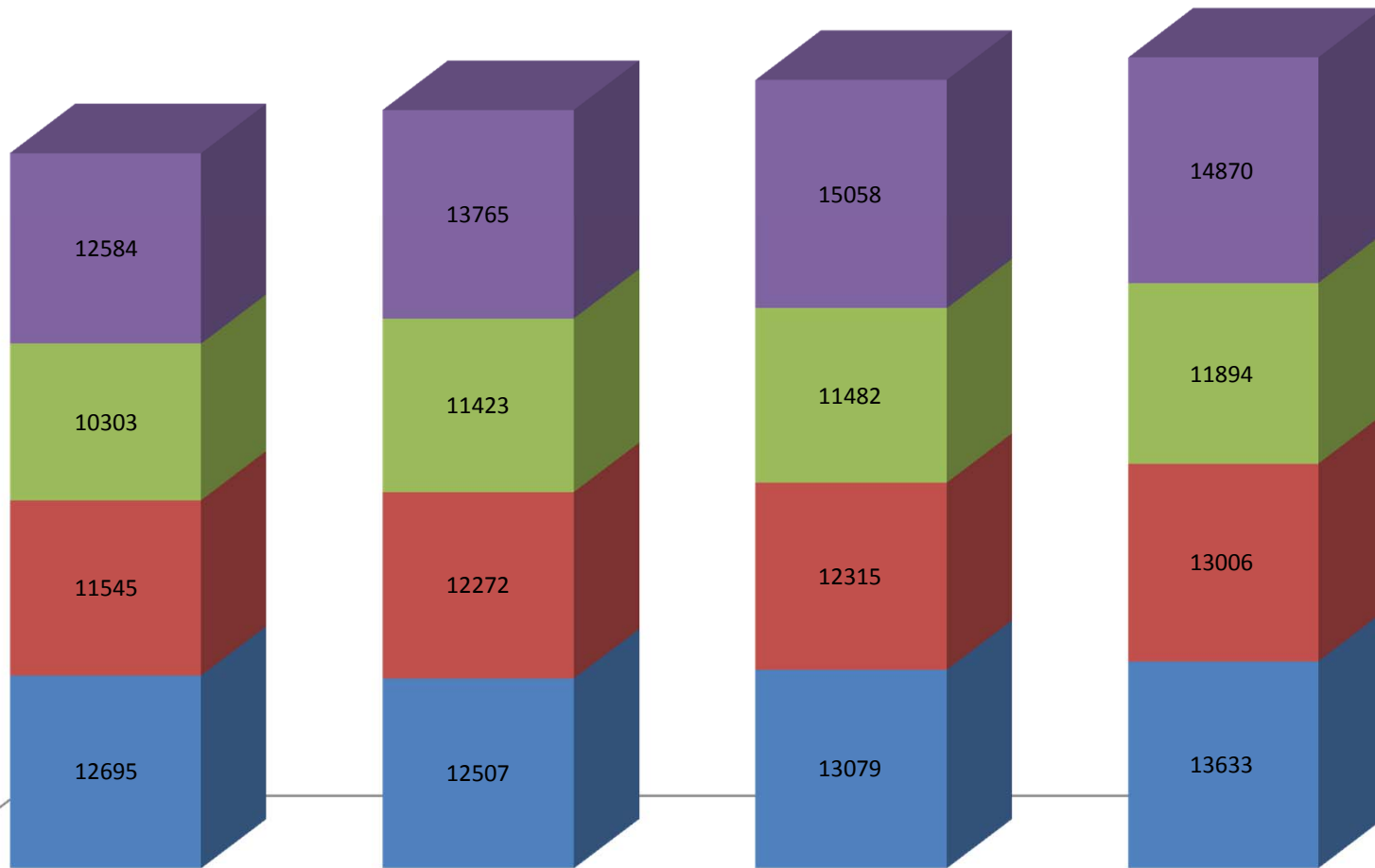
Actual Enrollment vs Low, Medium and High Enrollment Forecasts



	2013-14	2018-19	2023-24	2028-29
High		51120	54001	56056
Medium		49967	51934	53403
Low		49049	49944	50750
Actual	47127			
Old Medium	46901	49138	51155	

Medium Growth Forecast by Grade Grouping

■ K-2 ■ 3-5' ■ 6-8' ■ 9-12'



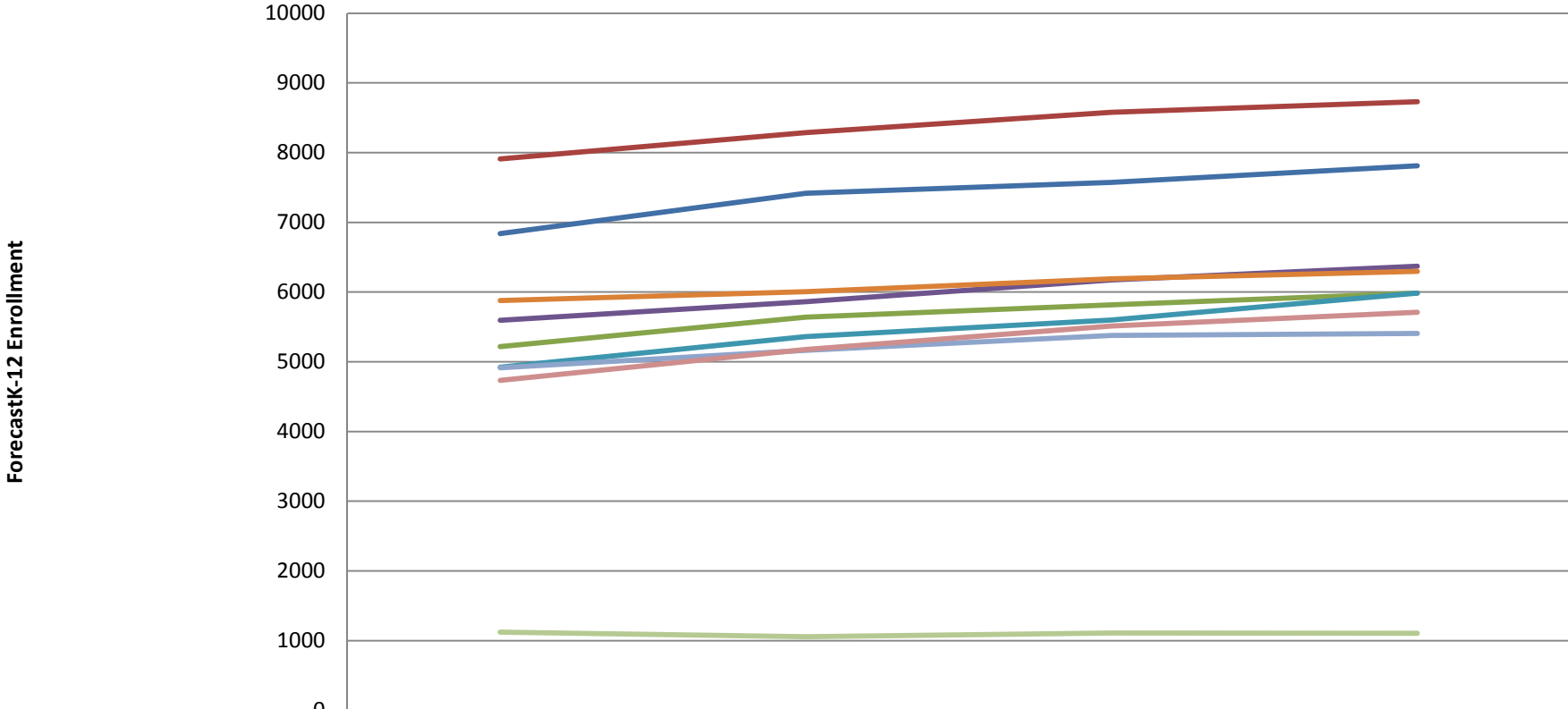
2013-14 (act)

2018-19

2023-24

2028-29

K-12 Medium Growth Enrollment Forecast by Cluster of Residence



	2013-14 (act)	2018-19	2023-24	2028-29
Cleveland K-12 Cluster Total	6839	7418	7575	7813
Franklin K-12 Cluster Total	7910	8288	8580	8732
Grant K-12 Cluster Total	5216	5638	5818	5986
Jefferson K-12 Cluster Total	5593	5860	6172	6372
Lincoln K-12 Cluster Total	4921	5362	5600	5983
Madison K-12 Cluster Total	5880	6006	6191	6297
Roosevelt K-12 Cluster Total	4915	5163	5377	5405
Wilson K-12 Cluster Total	4731	5175	5514	5710
Out of District	1122	1057	1107	1105

A Values, Growth, and Equity Strategy for District-wide Boundary Review

Aligning PPS's Policies and Practices to Address Short and Long Term Educational Priorities

Prepared by:

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September 30, 2014

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Summary

Portland Public Schools' enrollment is growing and will require continuing realignment in response to shifting demographics and other educational challenges. As it grows and adapts to changes, PPS is committed to equity by "providing instruction with the rigor, cultural relevance, and relationships that ignite the potential of each and every student."¹ The work is "necessary to serve a diverse student body well and prepare every student to navigate and compete in a culturally rich society and global economy..." A district-wide boundary review is one of many actions that support these stated goals. However, PPS must broaden its decision-making framework to consider several interconnected issues. School boundaries cannot be addressed as a stand-alone issue; rather they should be simultaneously considered with program equity, school configuration, and enrollment and transfers issues.

The Center for Public Service and National Policy Consensus Center (CPS/NPCC) recommends that PPS prepare for and launch a comprehensive community engagement effort focused on "Values, Growth, and Equity" that will define and inform policy decisions and practices around program equity, boundaries, school configurations, and enrollment and transfer. Additionally:

- Immediately, PPS should establish a District-wide Boundary Review Advisory Committee (D-BRAC) that will report to the Superintendent. D-BRAC should be charged with recommending new boundaries to be implemented for the 2015-16 school year for schools identified by PPS that have acute enrollment problems. In addition, D-BRAC should engage in setting new boundaries district-wide, based on community values, as soon as is feasible. See pages 11-12 for details.
- To assist the community with reviewing PPS data and meaningfully engaging with the boundary review process, PPS should develop comprehensive school profiles for all schools that allow for comparisons with other schools in the district. PPS should consider a partnership that would create a web-based tool that enables users to display and compare available PPS data. See pages 12-14 for details.
- Throughout this process, PPS should ensure that baseline program offerings are available at every school and to every student. See page 14 for details.
- PPS should develop and implement a Community Organizing Infrastructure that includes a set of nested, segmented activities designed to authentically engage communities, particularly communities of color and other historically underrepresented groups. The infrastructure will build on and expand the district's existing relationships with community-based organizations and outreach to parent groups, faith communities, and individual leaders. PPS should use this infrastructure in a community-wide engagement around "Values, Growth, and Equity," setting targeted percentage goals across the district, by demographic groups, and by individual schools. See page 15 and pages 17-24 for details.

¹ PPS, "The PPS Equity Initiative" <http://www.pps.k12.or.us/equity-initiative/>

Introduction

In 2012, Portland Public Schools launched an enrollment balancing process within the Jefferson High School Cluster to “create the enrollment stability necessary to support effective teaching and learning for students at every school” (Carole Smith, 2/1/13). Following a somewhat contentious process that resulted in four schools being consolidated into two and the closure of a focus option, concerned community members, especially within the Jefferson cluster, urged PPS to undertake a district-wide approach to student assignment and transfer policies, as well as a District-wide Boundary Review.

In response, on February 25, 2013, the PPS Board unanimously approved Resolution 4718, which directs staff, “to develop and recommend a process for a comprehensive review of school boundaries district-wide and policies related to student assignment and transfer to better align with the Racial Educational Equity Policy and promote strong capture rates and academic programs at every grade level.”

To address the student assignment and transfer policy issues, Superintendent Carole Smith charged the “Superintendent’s Advisory Committee on Enrollment and Transfer” (SACET) with recommending changes to student assignment and transfer policies to bring them into alignment with the district’s racial educational equity policy. SACET released preliminary recommendations in June 2014 and will finalize its recommendations and present them to the School Board in the fall of 2014. For the District-wide Boundary Review component, in December 2013, Portland Public Schools entered into an Intergovernmental Agreement with the Center for Public Service (CPS) at Portland State University (PSU) to assist the District with developing a process to engage a wide range of stakeholders in a comprehensive District-wide Boundary Review.

CPS proposed a three-phase approach for the “PPS District-Wide Boundary Framework” project, which would recommend next steps at the end of each Phase. As initially outlined from the vantage point of October 2013, the proposed approach would be as follows:

- Phase I (3 months): Initial Assessment and Framework Recommendations
- Phase II (7-8 months): Stakeholder and Community Engagement
- Phase III (4 months): Final Recommendations, Community Deliberations, and Decision Making

To conduct this work, CPS partnered with PSU’s National Policy Consensus Center (NPCC). On May 22, 2014, CPS/NPCC issued a Phase I Assessment report entitled “Complex Challenges and New Opportunities: Building the Framework for Boundary Review.” Some of the key findings in this report were that PPS lacked internal clarity and alignment on the purpose and goals of the proposed District-wide Boundary Review, that stakeholders were skeptical that boundary review could address larger equity issues facing the district, and that PPS’s capacity to engage the public is not uniform across the district. As a result, CPS/NPCC proposed that, rather than PPS moving full bore into the proposed Phase II “Stakeholder and Community Engagement” phase as noted above, that it stop and conduct a “bridge” phase, deemed Phase IIa, to focus on internal alignment and project planning.

The CPS/NPCC team and PPS officials agreed upon two major deliverables within this Phase IIa Scope of Work (SOW):

1. Design and present a District-wide Boundary Review strategy, including:

- Identifying, articulating, and aligning the scope, values, and principles of the District-wide Boundary Review process by facilitating alignment meetings involving key groups of PPS personnel, including PPS Board members, PPS central office staff, school principals, teachers, and other staff;
 - Working with internal PPS stakeholders to form an Executive Steering Committee (ESC) to guide the community engagement phase of the District-wide Boundary Review;
 - Advising and assisting PPS in preparing relevant and important data and information that will provide a common foundation for community understanding and engagement around the challenges facing the district that relate to boundary setting; and
 - Advising and assisting PPS with coordinating its District-wide Boundary Review efforts with the efforts of the Superintendent’s Advisory Committee on Enrollment and Transfer policy (SACET).
2. Develop a “community organizing infrastructure” with recommended strategies for working with specific entities and individuals who can add significant value to any community engagement process.

Data Collection Methods

The CPS/NPCC team conducted its work between May 15, 2014 and September 30, 2014. A variety of tools were used, as follows:

- Facilitated eleven alignment meetings with district leadership, including the Portland School Board, Superintendent, PPS department directors, managers, principals, and teachers;
- Participated in an alignment working session with members of the Superintendent’s Advisory Committee on Enrollment and Transfer (SACET);
- Attended SACET listening sessions in partnership with the Asian Pacific American Network of Oregon (APANO), Self-Enhancement, Inc. (SEI), the Native American Youth and Family Center (NAYA), and the Latino Network;
- Conducted interviews with PPS staff in family and community engagement roles and consulted with staff and members from community-based organizations focused on communities of color;
- Reviewed available PPS data and identified possible presentation methods and reviewed other school districts’ data availability, tools, and presentation methods.

The findings and recommendations of this Phase IIa alignment and planning work represent the views of more than 200 individuals.

This report concludes Phase IIa. It contains CPS/NPCC’s findings and recommendations for next steps in designing a comprehensive community engagement process that focuses on community values, growth, equity, and the related policy decisions that PPS will make in the future.

Part I: Internal Alignment & a Path Forward

During the Phase I Assessment CPS/NPCC found that “PPS lacks internal clarity and alignment on the purpose of the proposed District-wide Boundary Review” and concluded that the immediate term enrollment crises in several schools was driving the timeline and strategy for pursuing much larger equity goals. CPS/NPCC recommended that first building internal clarity and alignment among PPS leadership would build the foundation for lasting success.

Throughout Summer 2014, the CPS/NPCC team held alignment meetings with 30 of 33 PPS-identified district leaders including direct reports to Superintendent Smith and department directors and managers representing the academics, facilities, operations, transportation, and equity divisions of PPS to identify the scope, values, and principles of District-wide Boundary Review. In addition, the team conducted five other meetings including: a work-session with the School Board and alignment meetings with the leaders of the Portland Association of Public School Administrators (PAPSA), the Administrators of Color (AOC), the Portland Association of Teachers (PAT), and the Superintendent’s Advisory Committee on Enrollment and Transfer (SACET).

Throughout these meetings, CPS/NPCC heard a deep commitment to racial equity and the need to make significant changes throughout the district to achieve more equitable outcomes for all PPS students.

Finding 1 – PPS leadership found several areas of consensus around the purposes and goals of District-wide Boundary Review, but District leadership does not see DWBR as the primary lever to achieve the Superintendent’s top priorities.

In the summer of 2014, Superintendent Smith identified three priorities, all of which have racial equity at their core, for PPS to focus on over the next three years. These priorities are:

1. Ensure that all student’s are reading at grade level by the end of third grade
2. Accelerate the trajectory of the graduation rate increase
3. Reduce out of school discipline for all students by 50% and reduce the disparity of suspensions and expulsions between white students and students of color by 50%.

PPS leadership widely recognizes the Superintendent’s top three priorities and there is solid alignment behind them. There is also agreement throughout PPS that District-wide Boundary Review is not a primary lever to achieve these priorities. In fact, one participant noted that if she were given a list of 100 ways to achieve the Superintendent’s equity priorities, she would rank District-wide Boundary Review as number 75.

In these alignment meetings, the CPS/NPCC team asked participants for input on four key questions:

1. How can District-wide Boundary Review help achieve the Superintendent’s top three priorities over the next three years?
2. What is the primary purpose of District-wide Boundary Review?
3. What are the biggest challenges facing PPS over the next three years?
4. What is the public’s role in District-wide Boundary Review?

Leaders from academic, facilities, equity, operations, and transportation departments participated together in the facilitated meetings. It was useful for participants from the various areas to be mixed together to hear one another's perspective.

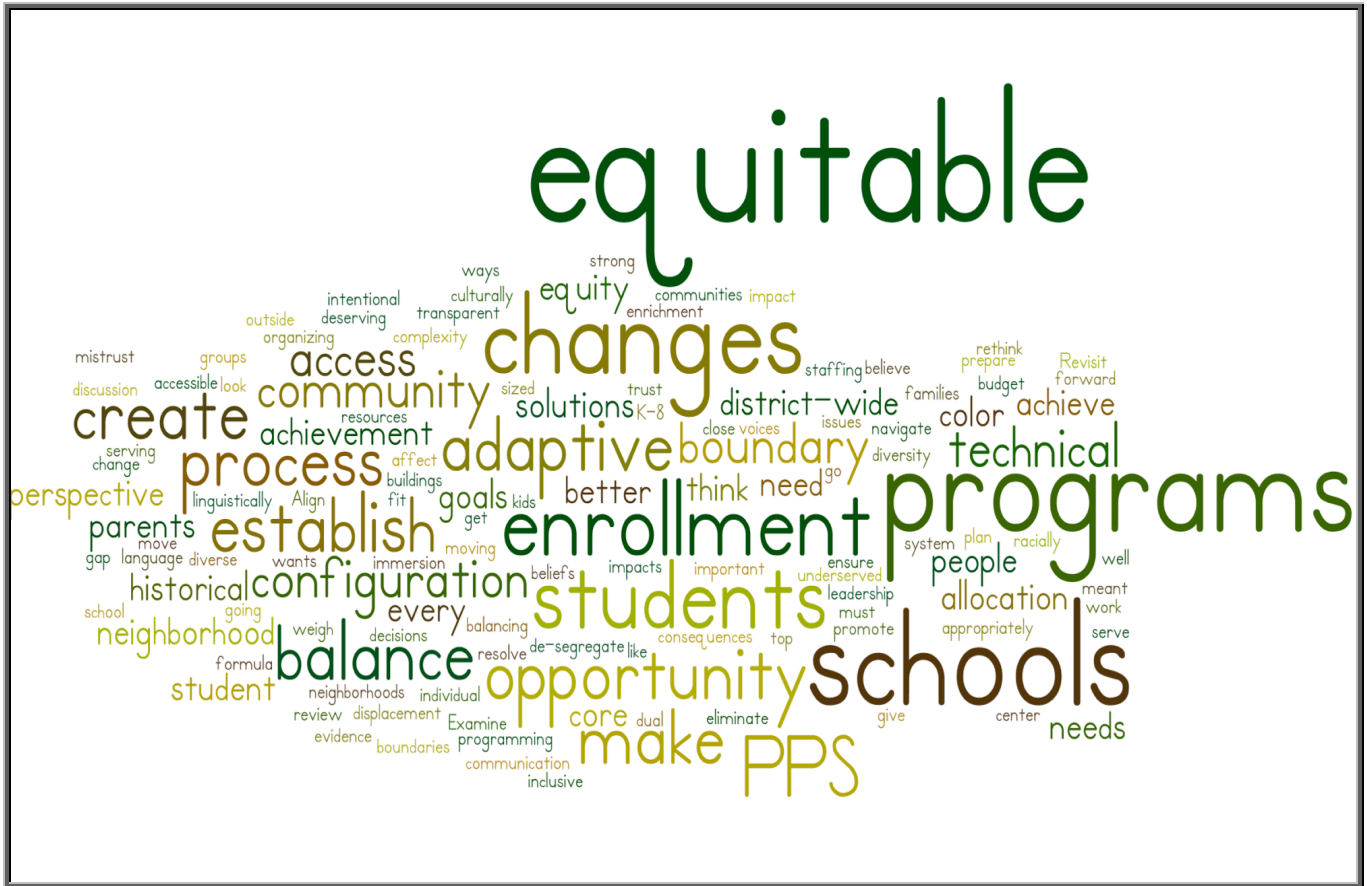
The Superintendent and her Direct Reports came to a consensus agreement that the primary purpose of district-wide boundary review is to: "Establish strong, appropriately sized programs through an equitable, inclusive, transparent and on-going enrollment balancing process." Leadership input from the alignment meetings support these ideas as the primary purpose.

The following themes emerged during the alignment meetings:

- There is a widely held belief that boundary review can be an effective tool in "right sizing" schools in order to create more equitable offerings under the current staffing formula.
- There is broad commitment to creating more equitable opportunities for all students in the PPS system and many leaders felt that changing the staffing formula and/or focusing on program equity is a more appropriate strategy to address equity than boundary review.
- There is significant awareness that boundary review, enrollment and transfer, program offerings, facilities, and staffing formulas are all inextricably linked. District-wide Boundary Review by itself is insufficient to achieve equity goals and may be less effective than program and staffing changes, grade configuration changes, etc. If District-wide Boundary Review is part of a comprehensive strategy, then it can help improve equity.
- Several groups noted that historical school boundaries have contributed to racial inequity in opportunities and outcomes and that boundary review is an important tool to correct those inequities.
- There are enrollment hot spots, meaning some schools are significantly over or under enrolled and those boundaries need immediate attention.
- Staff and School Board members agreed that a broad community conversation about boundaries should look at and discuss PPS issues, policies, and challenges holistically.
- There is no clear consensus about how to properly sequence the recommendations from SACET related to enrollment and transfer and district-wide boundary review.

Clearly, racial equity is a central focus among district leaders. Figure 1 is a word cloud created using notes from each alignment meeting about the purpose of District-wide Boundary Review. The conversations touched on many areas but were heavily focused on equitable programs, enrollment balancing, opportunity, and creating a process to gather broad and deep community input. See Figure 1 for details.

Figure 1: Notes from Alignment Meetings



Source: CPS/NPCC analysis and wordle.net

In addition, the CPS/NPCC team heard from the SACET alignment/joint work session that the current system for boundary review and transfers is not serving all students, and there is a great need to take on these “transformational” issues. However, some of the issues facing PPS are largely outside of PPS’s control, such as the City of Portland’s development plans and a lack of affordable housing.

Finally, the CPS/NPCC team heard from many SACET members that boundaries, enrollment and transfer, programming, facilities planning, staffing, and grade configuration should be simultaneous conversations.

Finding 2: There are significant challenges facing the district in the next three years

District leaders identified numerous challenges facing the district over the next three years, which is the same time frame that the Superintendent has identified for achieving her top three priorities. Many of the identified challenges can be grouped into broader themes. These include:

- **District capacity**—District leaders identified several challenges related to its capacity to take on major projects while simultaneously implementing other district

goals and/or completing basic operations. For example PPS leaders identified 46 projects that leadership is working on in 2014-2015, including:

- **Implementing state and federal mandates**—PPS is undergoing significant curriculum changes as it continues phasing in Common Core State Standards; implements Smarter Balanced Assessments (in place of OAKS, the Oregon Assessment of Knowledge and Skills assessment); and implements universal full-day free Kindergarten.
 - **Implementing other high-level priorities**—PPS’s commitment to closing the opportunity gap and creating more equitable program offerings is affected by multiple policy areas, such boundary review, enrollment and transfer, programming, facilities and the staffing formula.
 - **Negotiating staff union contracts**— Three PPS staff union contracts expire in 2014, one expires in 2015, and one expires in 2016. PPS will re-negotiate all five contracts over the next two years.
- **Voter support**—In 2011, Portland voters renewed a local option property tax levy raising \$57 million per year for teaching positions. In November 2014, PPS will ask voters to renew that levy. Additionally, in 2012 Portland voters approved a \$482 million school improvement bond. PPS is working to complete bond construction on time and on budget. The district may consider a 2016 bond to complete additional improvements at other schools.
 - **Board Elections**—in May 2015, four seats on the Portland School Board are up for re-election. PPS leaders recognize that potentially new incoming board members may have different priorities for the district.

For a list of frequently mentioned challenges PPS leaders discussed during alignment meetings, see Appendix A.

Conclusions

PPS is in a vastly different position than it has been any time in the last 10 years. It is emerging from an era of budget cuts, staff reductions, school closures and mixed indicators of educational achievement. Today, PPS is looking at 15 years of forecasted enrollment growth, it has recently hired nearly 400 new teachers, and the School Board adopted a “reinvestment budget” for 2014-15 that allows PPS to “strategically invest without simultaneously cutting programs.”² In September 2014, PPS had an additional unexpected \$16.8 million in surplus - three-quarters of which it intends to spend on staffing, building maintenance, and classroom supplies. The rest will go toward savings.

CPS/NPCC recognizes that the initial scope of this project was to “devise and implement a process to engage a wide range of current and future PPS parents, students and staff, community organizations, and other key stakeholders to conduct a comprehensive District-wide Boundary Review.”³ Any broad civic engagement process that authentically includes the varied voices of the community will require significant resources and staff capacity.

² Annual Budget, Portland Public Schools, p.3, (June 23, 2014).

³ PPS Contract Number IGA-60380. Intergovernmental Agreement signed by PPS and PSU December 16, 2013.

Based on our findings from both the Phase I Initial Assessment and this Phase IIa alignment and planning work, CPS/NPCC team concludes that District-wide Boundary Review should not be addressed as a stand-alone issue, without first—or simultaneously—addressing program equity, school configuration, and enrollment and transfer. We conclude that doing so would have a significant risk of failure for several reasons:

- Internal and external stakeholders widely agree that boundary review, enrollment and transfer, school configuration, program offerings, and facilities issues to be inextricably linked. Attempting to conduct a large-scale public engagement effort around one issue raises concerns, potential consequences, and ultimately, decision-making points around these related issues. Engaging the public around these intertwined issues without a strategy to address them will likely create further tension. District-wide Boundary Review is only one of very many challenges facing the district and the broader PPS community.
- At the onset of this engagement, PPS stated that it wanted the District-wide Boundary Review process to be a “reset” of how PPS leadership and the Board engage the community, to rebuild trust with the community, and to produce results that are lasting, rather than short-term. Based on the alignment meetings with PPS leadership and the external stakeholder interviews during Phase I, the CPS/NPCC team does not think that a process exclusively focused on District-wide Boundary Review will achieve those goals.
- PPS leaders identify racial equity as the central issue facing PPS. Community stakeholders are also concerned about equity. A large community engagement effort focused solely on District-wide Boundary Review would be too narrow to address the interrelated issues raised by PPS leadership and the community and would divert significant attention and resources from the Superintendent’s top priorities.
- We recognize that PPS cannot ignore enrollment issues at the schools with acute enrollment problems and must develop a plan for them before the 2015-2016 school year.

Recommendations

In order to conduct a broad community engagement process that authentically engages voices from the whole community, CPS/NPCC recommends that PPS prepare for and launch a comprehensive community engagement effort focused on “Values, Growth, and Equity” that will define and inform policy decisions around program equity, boundaries, school configuration, facilities, and other key areas as PPS navigates through a generation of growth. To do this successfully, CPS/NPCC recommends the following strategy:

Recommendation 1 – Establish and adopt a work and communications plan

CPS/NPCC recommends that PPS establish and adopt an aggressive work plan in order to complete the recommendations that follow during the 2014-2015 school year. As observed in the Phase I assessment and again during Phase IIa alignment and planning, PPS leaders juggle multiple ongoing projects and priorities and appear to be operating at full capacity. Launching a “Values, Growth, and Equity” community engagement project, and simultaneously addressing acute enrollment issues, will require commitment, attention, focus, and resources throughout PPS. PPS should dedicate resources and clarify expectations and roles for staff throughout the organization before beginning the project.

In addition to a work plan, PPS should develop and adopt a strategic communications plan for both internal and external communications related to “Values, Growth, and Equity.”

CPS/NPCC recommends an aggressive time line to adopt and begin implementing recommendations. See Appendix B for details.

Recommendation 2 – Establish a District-wide Boundary Review Advisory Committee (D-BRAC) to sequentially address acute and district-wide enrollment issues

PPS should establish a District-wide Boundary Review Advisory Committee (D-BRAC) that reports to the Superintendent and is charged with monitoring and evaluating enrollment issues and proposing changes, as necessary.

CPS/NPCC recognizes the enrollment challenges facing many PPS schools, and although we recommend a broader community process not focused solely on District-wide Boundary Review, we understand the importance and necessity of addressing boundary issues in the immediate future.

Charge of D-BRAC: During the 2014-15 school year, D-BRAC should be charged with recommending boundary changes to relieve acute enrollment issues at the schools identified by PPS with the most critical enrollment problems.

Upon resolving acute enrollment issues, D-BRAC should remain intact to begin District-wide Boundary Review and continue to monitor and review boundaries in the future.

D-BRAC Members: The Committee should be comprised of individuals with expertise in particular fields, PPS staff, and community stakeholders. The 21-member group should be balanced racially and geographically and should include:

- 1 PPS staff member from Facilities
- 1 PPS staff member from the Office of Schools
- 1 PPS staff member from the Office of Equity
- 2 Portland Association of Public School Administrators (PAPSA) representatives
- 2 Portland Association of Teachers (PAT) representatives
- 2 Parent Teacher Association (PTA) representatives
- 2 SACET members
- 2 Coalition of Communities of Color representatives
- 2 Portland School Board liaisons
- 3 Appointees of the Superintendent, including the Chair

- 2 Appointees from the City of Portland, including 1 demographic/population forecaster from the Planning Bureau and 1 representative from the Office of Neighborhood Involvement
- 1 member from the Portland Metropolitan Association of Realtors

D-BRAC Decision-Making Process 2014-15:

- The Superintendent should appoint the Chair of the committee;
- D-BRAC should have a PPS-designated lead staff person;
- D-BRAC should be facilitated by a professional external facilitator;
- The committee should establish the principles that it will apply to re-drawing boundaries for the schools with acute enrollment issues, consistent with the process outlined for boundary changes in PPS Administrative Directive 4.10.049-AD School Assignment Review & School Boundary Changes;
- D-BRAC should rely on and ask for PPS data, as necessary;
- New boundaries for the schools with acute enrollment problems should be recommended to the Superintendent by February 1, 2015; and
- New boundaries should be approved for implementation in time for the 2015-2016 school year.

D-BRAC Decision-Making Process for District-wide Boundary Review 2015-16

Upon addressing acute enrollment issues in 2014-15, D-BRAC’s decision-making process should use the 2014-15 process as a template and foundation for the group’s next assignment: District-wide Boundary Review. However, it will be vitally important that D-BRAC do the following in the next phase:

- Use the community-developed values (see Recommendation 5) to establish principles that it will apply to create boundary options and recommendations for future boundary decisions;
- Use the community-developed values to inform and create an ongoing process for boundary review in the future.

Recommendation 3 – Develop a comprehensive and user-friendly website to support community engagement

PPS’s System Planning and Performance Department has extensive data and publishes a variety of reports on enrollment and demographics, attendance, discipline, staffing, and others. It also produces school profiles for each school, which include budget, staffing, number of students per grade, number of neighborhood students and students from other neighborhoods attending the school, demographic information, neighborhood characteristics, three-years of achievement data, and other data points.

In the Phase I Assessment report, CPS/NPCC found that while PPS’s data collection and analysis capabilities are impressive, key information isn’t currently available in a clear, comparable, readily accessible format. We heard from external stakeholders that PPS’s data is difficult to access and often requires users to perform analyses on their own, which requires a level of data sophistication that not all stakeholders have. Further, it can result in misinterpretation of data.

Throughout any community engagement process, the community will seek PPS data relevant to the topic. To conduct an effective community engagement process on boundary review or another topic, users may want to see:

- **Comparable data viewable by individual school, neighborhood or cluster, grade configuration (elementary, K-8, middle schools, or high schools), and district-wide.** Factors or indicators for comparison include:
 - Demographics;
 - Poverty;
 - Staffing;
 - School size (capacity, how many sections per grade level);
 - Enrollment data - including longitudinal enrollment data, which would show year-to-year changes in students leaving or choosing to transfer out of a given neighborhood school catchment area and year-to-year changes in PPS-eligible students within each neighborhood school catchment area. In addition, yearly enrollment projections vs. actual enrollment which would allow stakeholders to see whether a significant gain or loss in enrollment was expected (see Phase I Assessment, p.28 for details);
 - Program information - including core programming, electives, special services, focus/immersion programs, and others;
 - School performance and achievement data;
 - Qualitative data from school climate surveys that include perceptions of school quality and performance, safety, and satisfaction.

To assist the community with reviewing PPS data and meaningfully engaging in the boundary review process, PPS should develop comprehensive school profiles that are comparable with other schools across the district. There are potential partners in the community that have developed mapping and comparative analysis tools. PPS should consider a partnership that would create a tool that enables users to display and compare the PPS data that they want. For example:

- **Metro**—Metro has used Geographic Information System (GIS) data to develop various tools used for planning and policy making. The Schools Context Tool (School Atlas) allows users to view specific indicators, such as Free and reduced lunch; English as second language; reading and math standards; Facility condition; and others to compare schools in the metro area. It has also developed an Equity Atlas with the Coalition for a Livable Future. The Equity Atlas is “Metropolitan Portland’s Geography of Opportunity” using 53 indicators in categories such as Community; Demographics; Economic Opportunity; Education; Food; Health Care; and others to compare the region. Metro uses these tools for planning and policy making. View them at:
 - **School Atlas:** <http://gis.oregonmetro.gov/schools/>

- **Equity Atlas:** <http://gis.oregonmetro.gov/equityAtlas/>
- **TOP**—TOP, or Tracking Oregon’s Progress, is a collaborative project between the Oregon Community Foundation, Oregon Rural Studies Program, Institute for Natural Resources, and Oregon State University Libraries and Press that tracks 89 metrics from 1990 to 2011 across all Oregon counties.⁴ It considers economic, people and communities, and environmental indicators and allows users to select the data they want to compare. TOP is available at: <http://oe.oregonexplorer.info/rural/communitiesreporter/OCR.aspx?isTOP=True>

Alternatively, PPS could consider partnering with Greater Portland Pulse or the Pacific Northwest College of Arts (PNCA) to develop its own tool. Greater Portland Pulse is a project of the Institute of Metropolitan Studies at PSU. It provides data and context to promote informed decision making in the Portland metro region. It uses 41 indicators in categories such as business, education, equity, health, and safety to help the community better understand our region.⁵ PNCA’s Collaborative Design program prepares students to solve complex problems using a variety of visual design techniques. The MFA in Collaborative Design draws on the city of Portland as a learning lab for graduate students seeking expanded design practices to meaningfully address the emerging challenges of the 21st century.⁶ GPP, PNCA’s Collaborative Design program, or another such program could help PPS develop a well-designed and functional tool for visualizing and comparing data.

In addition to making comparable data user-friendly, PPS should consider convening a semi-regular focus group comprised of Metro, the City of Portland, local realtors, local developers, and PSU’s Population Research Center. The group would convene to periodically share insights on housing and development trends in the city that may impact school enrollment and further improve demographic forecasts and enrollment trends.

Recommendation 4 – Ensure baseline program offerings are provided at every school and available to every student

PPS has established baseline programs offerings for students in grades K-8 and 9-12. However, the community believes that, due to enrollment, capacity, funding, and/or principal discretion, not all baseline programs are offered and available in every school to every student. PPS currently uses an 8% “equity allocation” to provide additional funding to schools based on the socio-economic status and the combined underserved population of the school, but it does not ensure programming is equitable across the district.

Many people believe that boundary changes result in “winners” and “losers” based on where the lines are drawn and what school their children are assigned to. PPS should require and ensure that every school offers baseline programs, regardless of the number of students, thus decreasing some of the contentiousness surrounding boundary review and enrollment and transfer decisions.

⁴ TOP, “About TOP,” http://oe.oregonexplorer.info/rural/communitiesreporter/top_indicators.aspx

⁵ Greater Portland Pulse, “About” <http://www.portlandpulse.org/about>

⁶ PNCA, “Overview of graduate programs,” <http://pnca.edu/graduate/c/info>

Recommendation 5 – Engage the community to establish values that will guide and influence PPS’s decisions across programs and departments

The CPS/NPCC team agrees that it is time for PPS to engage in a broad and deep engagement with the public. Based on alignment meetings with PPS leadership and external stakeholder interviews during Phase I, however, we do not believe that it makes sense for the PPS to expend the resources, time, and social capital to engage the community on boundary review alone.

Because of the number and complexity of issues that PPS is facing, it would be imprudent for the district to launch a major community engagement process that focuses only on boundaries without first—or simultaneously—addressing program equity, school configuration, facilities, and enrollment and transfer. Both internal and external stakeholders see those issues as intertwined and any community engagement effort will necessarily touch on all of them. Because of the resources required to initiate a deep community engagement process, we recommend that the district step back and use the process to gather public input on a broad range of issues.

As PPS faces significant enrollment growth, increased resources, and ambitious equity goals, upcoming decisions will affect facilities, school configuration, academic programs, boundaries, and enrollment and transfer. Using a set of community and Board-endorsed values to guide these decisions will help the district aim for a unified vision in service of the needs of all PPS students. Some individual schools (Harvey Scott, for example) have already engaged within their schools to identify shared values and have found this experience created more community cohesion amongst families. PPS now has the opportunity to do the same district-wide.

Following a robust community wide values discussion, PPS departments should create principles based on those values and operationalize them as it sets policy now and in the future. Such an exercise will also reveal where values come into conflict with one another and what trade-offs may be necessary.

To ensure that PPS is hearing from the whole community, PPS will need to establish a new model for engagement that reaches out both broadly and deeply. Once that model is established, it can be utilized for future district-wide engagements, continuing and building off of the infrastructure that gets established as part of this process.

We set out a framework for a community organizing infrastructure (discussed in detail on p.17) that utilizes targeted engagement goals for each school building and demographic group, especially for historically underserved communities that have not been deeply engaged by the district in the past. PPS should set visible and transparent engagement goals and make deliberate, mid-course decisions about where to target resources in order to ensure a high level of deep and broad participation in community engagement.

The PPS Board and Superintendent have also committed to conducting a “Climate Survey” in early 2015 that would survey parents on perceptions of school and classroom quality and performance, safety, and satisfaction. They also want to engage the community in a broader conversation about PPS’s vision. Since this outreach will be aimed at engaging the PPS community on questions about their individual classrooms and schools, CPS/NPCC sees an engagement around district-wide values as a natural next step following the Climate Survey.

Recommendation 6 –Combine D-BRAC and SACET in the future

Because enrollment and transfer issues and school boundaries are so intricately intertwined, PPS should combine D-BRAC and SACET into one advisory committee beginning in the fall of 2015. Doing so would permanently align these policy areas by allowing the same group to monitor, evaluate, and make recommendations on both topics.

Throughout 2014-15, SACET will be deeply involved in preparing its final recommendations to the Superintendent on changes to the lottery and transfer systems. Per recommendation 2 above, D-BRAC will be focusing its attention on resolving overcrowding at several schools across the district. However, next year, PPS has an opportunity to bring these two groups together to unify discussions and policy recommendations surrounding these interrelated topics.

Recommendation 7 – Formally consider the values developed by the public; use them to develop a 2025 Vision that builds on the Superintendent’s top three priorities; and operationalize the values and vision across the district

Upon completing a robust community engagement that identifies the community’s core values, PPS should formally consider those values and use them to develop a 2025 Vision and then apply the vision and values to major district policy decisions.

Superintendent Smith’s top three priorities are focused on the medium term, with the goal of achieving them by 2017. However, while PPS leadership has a strong focus on and a commitment to equity, the organization has not yet developed a longer-term equity vision – that is widely shared, highly inspirational, and serves as PPS’s decision-making compass – over the next 10 years, to 2025.

A 2025 Vision should describe what PPS should or could look like upon successfully implementing the equity-focused strategy outlined in this report. It should be developed with input from PPS leadership, publicly adopted by the Board and Superintendent, and cascaded and embraced throughout the organization.

Just as the Superintendent’s top three priorities are widely recognized and embraced among district leaders, so too should PPS’s vision and values.

Once PPS adopts the vision based on the values, it should operationalize them by applying them to the policy decisions the district is facing. These include, but are not limited to facilities, staffing, programming, boundaries, and enrollment and transfer. Operationalizing a shared vision and values across PPS will align PPS policies and actions, which will enhance the legitimacy of its public engagement process and contribute to the public’s trust in PPS decision-making.

Application to Boundary Review

Specifically, PPS should charge D-BRAC with using the community values to establish principles that it will apply to developing boundary options and recommendations for District-wide Boundary Review and future boundary reviews. See pages 11-12 for details on D-BRAC and recommended boundary review processes.

Part II: Community Organizing Framework for PPS

Background

The following Community Organizing Framework is intended to establish a “new normal” for PPS in conducting community engagement around any issue.

In summary, the framework includes creating a set of nested, segmented activities designed to ensure deep engagement within the broad PPS community. It is vital that at the outset of any engagement, PPS set visible and transparent metrics. The Framework is also designed to authentically engage communities of color and other historically underrepresented communities by continuing to build relationships with community based organizations and outreach to parent groups, faith communities, and individuals who are willing to partner with PPS during the engagement process.

The Community Organizing Framework is intended to be flexible and adaptable to the needs of the many constituencies PPS serves and is intended to be useful for any significant community engagement processes PPS might undertake in the future. Recognizing that each process will differ and that communities and leadership change over time, PPS will need to adapt and update the organizing goals, engagement goals, organizing organizations and individuals, and activities on an on-going basis.

PPS Organizing Activities

- Align existing PPS community engagement assets to support community organizing;
- Adapt identified list of community-based organizations (and associated individuals) with skills, resources, and relationships to engage community members from a variety of communities to make sure those voices are heard on PPS issues;
- Identify and map out informal parent leadership on a per school basis (an on-going, yearly basis exercise as parents come and go);
- Identify gaps where community-based organizations (CBOs) or known leaders aren’t already established or known based on the issue PPS wishes to get input on and the communities PPS wants particular input from;
- Identify relevant ways to gather the input for specific groups, particularly historically under-represented communities (settings, conveners/inviters, particular needs - e.g. translation, transportation);
- Provide needed resources or technical expertise to those CBOs and individuals to empower them to organize engagement efforts and activities; and
- Set overall engagement goals as well as engagement goals for specific, historically under-represented communities. Monitor progress on those goals throughout the engagement and redeploy resources and adapt strategies as needed.

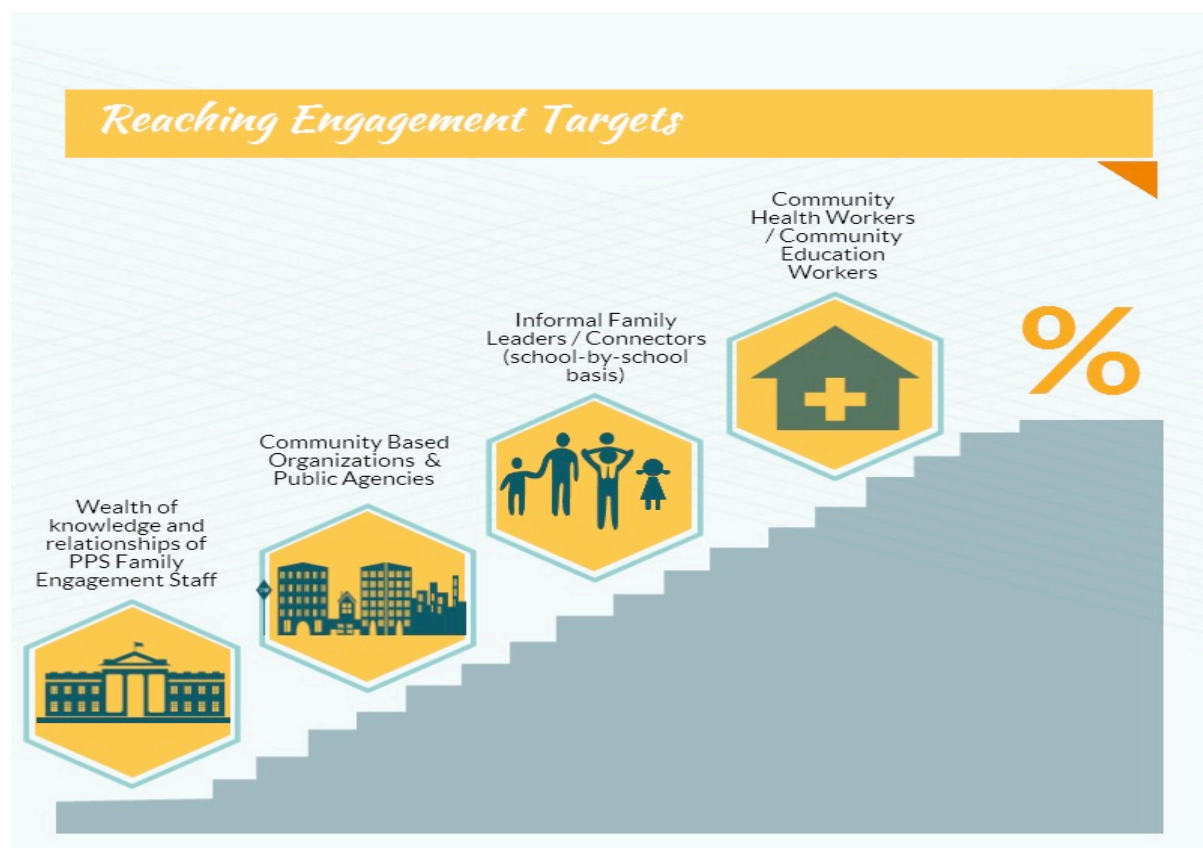
Engagement Goals

We recommend that PPS set targeted percentages across a variety of levels for engagement participation, including district wide, demographic groups, and by school. Throughout the engagement period, PPS can establish check-in points to determine where to target outreach resources to encourage participation in meeting those targets.

- Engage 40% of families of PPS students district wide;
- Engage 50% of participation from families of PPS-identified demographic groups, particularly historically under-represented groups;
- Engage an average of 40% of participation from each school;
- Engage 60% of participation from identified demographic groups from particular schools that are most likely to be impacted by a boundary change (or by whatever issue the public is providing input on).

See Figure 2 for details.

Figure 2: Identifying Organizers from Multiple Sources



Source: National Policy Consensus Center

In order to achieve as broad and deep a community engagement process as possible, we suggest PPS take a segmented, multi-step ladder approach to creating a Community Organizing Infrastructure. All steps on the ladder are vital to ensuring that PPS meets its engagement goals and that voices traditionally left out of the conversation are amplified and heard. Each step requires a different set of resources and even activities, particularly the steps involving Community Health / Education Workers and Informal Family Leaders. While these steps will require more time, involvement of principals, teachers, and resources, they also will most likely lead to PPS successfully hearing from as many community members as possible, particularly from historically under-represented communities. Over time, once the communities become accustomed to participating and the pathways are established, the level of needed resources should decrease. The multiple steps consist of: Internal PPS Community & Family Engagement Staff; Community Based Organizations and other Public Agencies; Community health workers / education workers; and informal family leaders / connectors (school-by-school, with principal involvement).

It is also important to note that this type of nested, segmented engagement focuses on grassroots, person-to-person engagement rather than arms' length marketing with the intention of not only generating a high participation rate, but also increasing social capital both within school buildings and across the district.

PPS - Internal Resources

The District has a number of departments where staff are already highly involved in community and family engagement and where strong partnerships with CBOs are already in place. These departments, their roles, and associated staff are listed in Appendix C. We recommend utilizing the wealth of knowledge and relationships already in place in a coordinated, strategic effort. PPS also has assets in place, such as a large and actively engaged email list (38,000 emails with a read rate of 45%), to immediately mobilize large numbers in the community. However, aligning the efforts of community engagement staff will assist in reaching even more deeply to the thousands of parents who either aren't on the PPS email list or don't engage as readily via email communication.

In addition, school principals are strong partners in encouraging building-by-building participation as well as in helping identify informal leaders in their school communities who can organize communities and garner input in ways that are specific to those groups.

In order to maximize the effectiveness of existing PPS resources, it will be important to communicate clearly about roles and expectations both before the process and throughout the engagement period.

Some of the challenges PPS may face in coordinating Community & Family Engagement staff in a broad outreach effort include:

- Staff who provide some type of community or family liaison role are located across different departments. For a district-wide engagement, a cohesive strategy or standard for engagement would need to be created and staff should be directed to prioritize engagement activities;
- Staff are already engaging with families on particular, specific topics. PPS would need to identify the resources to help support them in engagement that is outside their day-to-day engagement;

- Current PPS contracts with partner community-based organizations would not cover additional engagement;
- Translating announcements, materials, and postings related to engagement activities and events will require a coordinated effort among departments to make sure that communications are sent early and at the forefront of the process;
- Additional work with principals to identify informal leaders and connectors on a school-by-school basis is required.

Community Based Organizations and Other Public Agencies

PPS already has existing relationships with many Community Based Organizations who work directly with families from particular ethnic and cultural groups. These relationships are vital to conducting inclusive outreach throughout the community, but ensuring a deep engagement with those families will require additional resources for those CBOs to assist in organizing efforts as any community engagement will likely be outside the scope of current contracts with the District (e.g. Boundary Review).

In addition, other public agencies in the city and region could provide important outreach channels as well as engagement assistance. Multnomah County Library, Multnomah County Educational Services District, and Multnomah County Health Department all provide services to families (parenting classes, vaccination, etc) and could potentially provide avenues for engagement. Multnomah County Library, for instance, already partners with PPS Head Start and could potentially connect parents in their parenting classes to online consultations, and encourage them to use the library computers to complete the consultation. The Multnomah County Department of Human Services serves families in poverty and homeless youth and families. The City of Portland has trained a set of community leaders from diverse cultural and ethnic groups on city governance. These leaders could assist in organizing their communities in responding to a call for public engagement. A list of organizations, contacts, and potential barriers or limitations to their ability to serve in an organizing capacity is listed in Appendix D.

Family Leaders and Connectors (including students)

Any community engagement effort will be most successful if PPS is able to activate informal leaders and connectors within a community to organize participation. Whether the engagement takes the form of an online consultation or in-person conversations (in large or small settings), the most effective way to ensure participation is if one person (a friend, a neighbor, a trusted community leader) directly asks or invites someone else to attend a meeting or respond to a survey. Activating these informal leaders or connectors at a school-by-school level will be key to high levels of participation and meeting the goals PPS sets out. Both PPS principals and SUN School Coordinators will be key in identifying - on an ongoing, year-by-year basis - who those leaders are among families (parents and siblings, likely at the high school level). We recommend that PPS invest the time and effort in creating (and then updating) a profile of each school to identify those leaders, informal family group members, and formal parent group members (PTA, for example). For some communities, outreach through older siblings could prove to be an effective channel.

High school students can play a key role both in organizing among other students as well as in organizing their own families to participate. The Superintendent's Student Advisory Committee (Super SAC) could lead efforts to organize at their individual schools and across the district. Older siblings – whether current PPS students or not – can also play key roles as family connectors, particularly with families where older siblings are the main communicators on behalf of their parents and siblings.

Community Health and Education Workers

Community Health Workers (CHW) are housed in various CBOs, churches, and health systems. They provide house visits to the most vulnerable populations and give guidance on reducing health issues. Traditionally, CHWs have also provided support to families in schools since they see education as a predictor of health. Due to an increase in CHWs role in schools, Multnomah County Community Capacitation Center will be working with three CBOs to support Community Education Workers, which will be housed in a few PPS schools.

Community Education Workers (CEW) will be housed at the following CBOs: Latino Network, Urban League, and NAYA. Using CEWs will be vital to reaching parents who aren't typically involved in CBO's work such as the leadership programs mentioned above.

Organizing Activities

While any input process should rely on the same "instrument" - the set of questions that PPS wishes to hear from the public, PPS will need to tailor methods for both encouraging and collecting that input by school and demographic group. We recommend a combination of activities, including an online community consultation via Oregon's Kitchen Table (see details below) as well as culturally relevant in-person events. We believe this combination will lead to a deep understanding of the opinions of a high percentage of the broader PPS community. As a result, the process for collecting the data will be segmented, but the input will be uniform and will be easily comparable.

Community Consultation Instrument via Oregon's Kitchen Table

Oregon's Kitchen Table (OKT) is the creation of the Hatfield School of Government at Portland State University in partnership with a group of non-partisan, non-profit community organizations and highly regarded leaders representing diverse community perspectives dedicated to helping Oregonians have a voice. This group founded Oregon's Kitchen Table in order to create permanent civic infrastructure through which Oregonians can provide real-time feedback, opinions, and ideas to decision-makers. Oregon's Kitchen Table staff work closely with local, regional, and state community leaders to create in-depth online consultations that reflect the tough trade-offs and challenges decision makers confront in governing. The public – currently, there are more than 5,300 Oregonians from across the state signed up for Oregon's Kitchen Table – then provides leaders with high-quality feedback on those issues. Oregon's Kitchen Table has been used at the state, local and regional levels to gather feedback from a wide variety of Oregonians on a range of topics, including state budgeting priorities, county budgeting, and regional economic development priorities. The consultation can also include questions to track how and from where community members came to the online or paper consultation as well as the best way to reach those communities to inform future public engagement processes.

An Oregon Kitchen Table consultation would include the following elements:

- PPS, in consultation with the Office of Equity, CBOs, and other internal and external stakeholders, would co-produce questions for a public consultation with Oregon's Kitchen Table staff.
- OKT staff would develop a detailed online consultation that allows PPS community members to work through the key questions, allowing community members to offer ideas, input, and feedback. The online tool can be provided in both English and Spanish, with any additional translations on paper surveys.
- PPS would work with OKT staff to create an outreach plan, utilizing the activities and relationships outlined in this Community Organizing Infrastructure as well as PPS's traditional methods of communication.
- Oregon's Kitchen Table staff would execute the detailed online consultation. The online consultation is typically open for four to eight weeks.
- In-person activities and events would occur to provide public forums for deliberation and outreach to drive participation through the Oregon's Kitchen Table online tool. Often, these in-person events include direct, on-site access to the online tool and paid organizers to assist community members in responding.
- PPS would utilize its own resources and paid community organizers to coordinate outreach efforts and assist community members in providing input, via the online tool and translated paper surveys. PPS and OKT would make paper surveys available where necessary, particularly to ensure multiple translations. Data from the paper surveys can then be compiled and added to the data from the online responses.

Organizers (from CBOs, public agencies, or informal leaders/connectors) would be responsible for:

- Identifying necessary resources for his / her community;
- Disseminating invitations;
- Calling people to remind them to come to an event or meeting;
- Potentially hosting or identifying a host or location (includes facilitating or identifying a facilitator, onsite input collection via consultation instrument, and turning input over to data collection team organizer questionnaire to identify any challenges or successes for adjustment).

Organizers will need:

- Training for organizers on the instrument;
- Resources (as identified, based on the % engagement goals PPS has set).

House parties and Other Self-Organized Events

While some communities will be ready and able to engage in large meetings on this topic or easily utilize online forums (Facebook, Oregon's Kitchen Table), other communities will be more likely to participate in guided, small group discussions held in culturally appropriate

settings. We recommend following a “house party model”, arranged by community organizers (from CBOs, and/or informal school leaders), as well as formal school leadership such as the PTAs and site councils.

The house party model includes the following elements:

- Guided, small-group discussions held in culturally appropriate settings (the school or a church, community center, apartment complex, individual home, etc);
- Facilitated discussions hosted by respected leaders (facilitated by host or other identified individual);
- Downloadable and translatable “House party packet” (agenda, background materials, discussion guide, consultation instrument on paper, sign in sheet, FAQs, etc.);
- Report sheet for the host to return, capturing and describing the event;
- Hosting stipend (~\$50 for food/beverages/space fee);
- Identify ahead of time whether PPS staff attendance is desired.

The goal of house parties and other self-organized events is to allow for an unlimited number of in-person, deliberative interactions in more informal settings where people can feel comfortable speaking about their views on whatever the topic is (e.g. enrollment and transfer, school configuration, boundaries, etc.) and where organizers can systematically collect information and pass along to “data collectors” for integration with all data.

Other Events

In addition, community organizers can also piggyback on already established events – e.g. school science fair or International night (organizers will need to identify what those are for each school or cultural group) or community events (Good in the Hood, Black Parent Initiative Annual Parent Symposium, Jade District Night Market, Portland Mercado, Hispanic Heritage month activities, Slavic Festival, for example). These will depend on the schedule (many happen in summer or September/October) of any engagement process.

Ongoing Infrastructure

While an initial broad, district-wide community engagement process will require substantial time, resources, and capacity, PPS can use this opportunity to create ongoing infrastructure to decrease additional needed resources for each “next” engagement. We recommend the following as PPS looks towards positioning itself for ongoing engagement:

- Clarity of roles and points of contact for a variety of PPS departments with community engagement or family engagement liaisons or agents;
- Conduct an ecosystem mapping process to see how CBOs and PPS are connected and how they can help each other succeed;
- PPS can hire community organizers who can work on an ongoing basis with community-based organizations and cultural groups on a variety of issues within high school clusters;

- PPS could consider re-organizing existing community agents and liaisons to bring them into one entity that works cohesively to engage families on a variety of issues;
- Annual updating of school profiles of family leaders and connectors;
- Documentation and feedback processes so that community organizers can keep a record of what has been done and how through the use of standardized questionnaires. This history can help create institutional memory and be a resource even as individuals leave positions or the community itself changes; and
- Any consultation can also include questions to track how and from where community members came to the online or paper consultation, as well as the best way to reach those communities to inform future public engagement.

Appendices

Appendix A

What are the biggest challenges facing PPS over the next three years? (Answers NOT listed in priority order and NOT sorted by frequency mentioned)

- Achieving Superintendent's top priorities
- Local option-Nov 2014
- Second capital bond November 2016
- Delivering high schools on time and on budget by 2017
- Board Elections May 2015 & 2017
- Pay for full-day K
- Smarter Balanced Assessments
- Common Core
- Legislative sessions
- Renegotiations - every union contract expires (six union contracts)
- Principal and administrative support
- PAT teachers - positive relations
- Increasing district's cultural competency - getting adults to act and think differently in schools
- Hiring 400 new teachers and a retiring workforce
- Human resources bandwidth
- Putting children and their needs at the center
- Continued impact of gentrification
- Annual budget
- Visioning process
- High School master plans
- Increasing enrollment - preparing for 5,000 more students
- Enrollment and Transfer policy changes
- Right size schools and reduce class size
- Current enrollment & transfer policy doesn't support Equity Allocation budget process
- Fix program-facility issue (K-8 in small buildings)
- Boundary review & SACET - new policies need to meet our equity goals
- Boundary review can support superintendents goals, but not on its own. Needs to be strategically coupled with other strategies
- Staffing formula adjustment
- Build boundary campaign that creates trust
- Relationship with the city is important - jobs, affordable housing, minimum wage all affect whether people stay.
- How is this boundary process going to be better than what they already have?
- If transfer choice is limited, will people still choose PPS?
- Teacher evaluations based on student growth and learning (HB290)
- Bring more internships & business into high schools to increase graduation rates.
- Aging facilities and growing enrollment
- Attachment to neighborhood schools in the face of boundary changes

Appendix B

Table 1: Proposed Timeline for Implementing Recommendations

Month	Work Plan	Communications with Public	D-BRAC	Data	District-wide Baseline Program Offerings	Values – Community Engagement	Climate Survey
Month 1	Establish work plan and internal communications plan	Establish plan	Establish D-BRAC	Identify partnerships and any additional data needs	Identify barriers to offering baseline programs to every student	Establish target percentages; Set up contracts with CBOs	Prepare for Climate Survey
Month 2	Make any adjustments to work plan	Ongoing – Update and adjust for civic engagement outreach plan	D-BRAC establishes principles for urgent boundary changes	Work w/ partners to create dashboard	Resolve barriers	Formulate instrument in consultation with stakeholders; Develop outreach plan	Prepare for Climate Survey
Month 3		Ongoing – Market Climate Survey and Values	D-BRAC addresses “hot spots” with recommendations by February 1, 2015	Work w/ partners to create dashboard	Resolve barriers	Market Values; prepare community organizing	Market Climate Survey and Values; Open Climate Survey
Month 4		Ongoing – Market Climate Survey and Values	D-BRAC recommendations	Work w/ partners to create dashboard	Ensure baseline programs are offered to every student	Market Values; prepare community organizing	Open Climate Survey; Market Values
Month 5	Make any adjustments to work plan	Ongoing – Communicate results to public	D-BRAC assists with outreach for civic engagement	Work w/ partners to create dashboard		Open instrument; CBOs conduct in-person events	Climate Survey analysis
Month 6		Ongoing – Focus on outreach for civic engagement	D-BRAC assists with outreach for civic engagement	Make dashboard available to public		Continue open instrument; CBOs conduct in-person events	Climate Survey analysis
Month 7		Ongoing – Communicate how values are being operationalized				Open instrument; CBOs conduct in-person events; Data analysis; Response to Values and Climate Survey results	Present Climate Survey results with Values results
By Sept 2015			Having dealt with hot spots, D-BRAC operationalizes Values for District Wide Boundary Review			Proceed with policy based on Values; Address any conflicts with forced choices	

Appendix C

Table 2: PPS Internal Resources

Department / Office	Role	Contact Name
ESL Community Agents	Educational assistants provide direct support to teachers and emerging bilingual students and families.	Van Truong Reports to Asst Superintendent for Curriculum and Instruction (Melissa Goff) through ESL Director (Van Truong)
Educational Partnerships	Contracts with Culturally Specific Family Engagement Agencies (SEI, BPI, Latino Network, NAYA, IRCO) and some specific individuals (both PPS and contracts w/ agencies) who work with families in specific areas / specific schools / clusters	Dunya Minoo Reports to Chief Equity Officer (Lorenzo Poe) through Educational Partnerships Manager (Dunya Minoo)
School and Family Partnerships	Family Engagement Coordinators - these are PPS employees who work district wide with schools / families and are culturally specific. One of the six coordinators (Richard Gilliam) works within one cluster (Jefferson). The remaining five are not school / cluster specific.	Willie Poinsette Reports to the Asst. Superintendent for School Operation Supports (Harriet Adair) through the School/Family Partnerships Director (Willie Poinsette, interim)
Translation / Interpretation Services	PPS employees and contractors who provide language support services to families (not specifically tasked with engagement, but often the staff/contractors on the scene providing interpretation during an event).	Willie Poinsette Reports to the Asst. Superintendent for School Operation Supports (Harriet Adair) through the TIS manager (Willie Poinsette, interim)
Head Start Family Advocates	Employees who support families of PPS Head Start students, by providing advocacy training and helping with enrollment in assistance and wellness programs.	Reports to the Asst. Superintendent for School Operation Supports (Harriet Adair) through the Head Start Program Principals (Deborah Berry and Eileen Isham)
SPED Family & Community Liaison		Esther Harris

Appendix D

Table 3: Community Based Organizations⁸

Organization	Communities Served	Resources in place	Barriers	Resources Needed
Latino Network	Latino	Lideres Training	Time, Funds	Funds
APANO	Asian and Pacific Islander	Leadership classes	Time, Funds	Funds
Coalition of Communities of Color	Educational Justice Committee	Leadership Development Initiative	Time, Funds	Funds
Urban League	African & African American	Community Health Workers	Time, Funds	Funds
IRCO	Immigrant & Refugee		Time, Funds	Funds
Albina Ministerial Alliance				
Catholic Charities (Kateri Park in SE / El Programa Hispano)	Refugee communities / Latino	Community Health Workers in many churches	Time, Funds	Enough time to organize their CHWs & funds to pay for their time
Hacienda CDC				
Slavic Community Center	Slavic			
Lutheran Community Services NW (School Assistance For Refugee Newcomers)	Refugee Communities			
Albina Head Start				
Neighborhood House				
Impact NW				
Multnomah County Library	Parenting Classes / Computer Classes			
Multnomah Health Department	Early childhood - Vaccinations			
Multnomah County Department of Human Services				

⁸ This list is intended as a snapshot of potential CBOs for partnership. Once PPS decides to embark on an initial community engagement, we recommend using this list as a starting point and continuing to identify the areas of focus, barriers, and needed resources.

Organization	Communities Served	Resources in place	Barriers	Resources Needed
City of Portland's Diversity and Civic Leadership Program				
City of Portland Parks and Recreation (Outreach Program/ Race & Ethnicity Project / Community Centers)				



Board of Education Informational Report

MEMORANDUM

Date: 10/3/14
To: Members of the Board of Education
From: Amanda Whalen and Kathi Koenig
Subject: Achievement Compact Advisory Committee Recommendations

Attached please find the following documents for your discussion on the Achievement Compact Advisory Committee Recommendations:

- 1) A memo from the Achievement Compact Advisory Committee
- 2) Board Resolution 4943
- 3) The proposed methodology for setting targets
- 4) Achievement compact data for Board discussion
- 5) A draft completed achievement compact for 2014-15

If you have any questions, please let us know.



Board of Education Informational Report

MEMORANDUM

Date: 10/3/14

To: Members of the Board of Education

From: Achievement Compact Advisory Committee

Subject: Achievement Compact for 2014-15 School Year

School districts are required to set annual targets for the metrics on the Achievement Compact. Over the last three years, our committee has developed a methodology that we have employed consistently in order to set those targets. We also identified two primary targets to focus on: five year completion rates and third grade reading.

For the 2014-15 school year, Oregon will no longer be using the Oregon Assessment of Knowledge and Skills (OAKS) and instead will transition to the Smarter Balanced Assessment (SBA) for its annual assessments. This will affect three achievement compact metrics: third grade reading, fifth grade math, and eighth grade math.

In July 2014, the Board of Education unanimously approved the attached resolution formally asking the State and Federal Departments of Education to delay using the SBA for “labeling or sanctioning.” The following is a provision from the resolution:

“The Board requests that the State not use the Smarter Balanced Assessment for punitive labeling or sanctioning of students, teachers, schools or districts. There must be assurances on the reliability and validity of the assessment. Use of an unreliable or invalid Smarter Balanced Assessment could undermine student enthusiasm for learning, could create devastating outcomes for schools, and could set schools and communities back years if not managed well at the state and local levels.”

In line with the resolution, the members of the Achievement Compact Advisory Committee unanimously recommend that the Board decline to set targets for the three metrics that would employ the SBA until we receive “evidence that the assessment is reliable, valid and free from cultural, linguistic, and socioeconomic bias.” (Board Resolution No. 4943)

As third grade reading is a district-wide priority, we recommend that the Assessment and Testing workgroup (a currently-forming joint work group made up of teachers and administrators) be charged with developing a recommendation to the Board on how to measure third grade reading achievement. That workgroup is scheduled to report to the Board in November.

We have made a few adjustments to the previously-agreed upon methodology and have attached that to this document. We recommend that the Board employ this methodology to set

targets for the other metrics, including graduation and completion rates, attendance and college credit attainment.

While the district has made gains in some areas toward the targets, we cannot meet these aspirational goals without a significant investment in education. While all members on the committee remain committed to setting aspirational targets, substantial concern remains that 100% is not a realistic target under current funding conditions. State funding is still far below the Quality Education Model (QEM) calculation. For 2013-15, State funding was at 76% of the fully funded QEM level.

Over the last three years, our committee members have identified a number of successful strategies for engaging students and improving student achievement. Some examples include:

- Hands-on learning such as robotics, computer programming, journalism, shop with modern tools and techniques and curriculum relating to the hands on work
- Dual language immersion and access to second language acquisition for non-immersion students across all grades and schools
- AVID expansion
- Culturally specific supports for students and families
- Wrap around supports for all ages to assure healthy, well-cared for and supported students
- Arts programming
- Time for movement and exploration
- Certified librarian in each school and more books available for libraries
- Lower class sizes especially at the younger grades
- Parent and community outreach, and engagement
- Support for teachers and principals in how to meaningfully engage parents, families and community
- "We the People" teams in middle grades
- Staffing and support in earlier grades to assure students arrive in later grades with strong foundations in all subjects and ready to succeed at next grade level
- Support team staff including counselors, technology support, para-educators, maintenance and safety support as well as professional development for research based strategies

It is imperative that the State's investment in education provides PPS with the resources to have equity in full programs in every school: offering strategies such as these along with other enrichments and supports in order to meet the State's goal of 40-40-20 and our own Achievement Compact targets.

While this Committee is tasked with making recommendations on targets in areas specified by the State, and while the members recognize that goals for student achievement (as measured by test scores) in these particular areas are important, we want to caution that the numbers alone cannot drive the education of PPS students. Enrichments and emotional supports are as important as academics in developing an ongoing love of learning in our students. Our work needs to value our students' experiences and continue to emphasize the rigor, relevance, realness and relationships in order for our students to become productive members of our society. We support the education of the whole child.

Thank you for the direction that you provided to our committee in completing this task through your July 2014 resolution. Also, thank you for continuing to appoint ex-officio members from the community (representatives from the PTA and Coalition of Communities of Color) to our committee. These additional perspectives have been invaluable to our team.

We look forward to discussing these recommendations with you at the October 6th work session.

Recommended Methodology for Setting Achievement Compact Targets for 2014-15:

1. **College and Career Readiness Outcomes:**
 - a. **4-Year Cohort Graduation Rate, Post-secondary enrollment and Earning 3+ College Credits** (this target has changed from 9+ college credits so this year is new baseline data): Given the interrelated nature of these outcomes to the State's 40-40-20 goals, we recommend setting a target of 100% for each indicators by 2021 (4-Year cohort college graduates in 2025)
Methodology: We recommend determining the annual growth rate necessary to reach 100% for each indicator by 2021 through a back mapping process for all students and historically underserved students. We have assumed a constant rate of growth in progressing toward our overall targets. This means the amount of growth needed each year to meet our defined target is the same year over year.
 - b. **5-year Completion Rate:** This committee has previously recommended an ambitious target of 100% of this year's 10th graders completing high school or the equivalent by 2017-18
Methodology for 5-Year Completion Rate: In order to meet our goal of 100% of this year's 10th graders completing high school or the equivalent in 5 years, we have back mapped from 100% of students completing in 2017-18 and determined the annual constant growth necessary for all students and historically underserved students.
2. **3rd Grade Reading Proficiency:** Our goal is to have 100% of third graders reading to learn.
Methodology: Decline to set a target employing the Smarter Balanced Assessment until we receive assurances on the reliability and validity of the assessment. The Assessment and Testing workgroup will develop a recommendation on how to measure 3rd grade reading achievement and report back to the Board of Education by November 2014.
3. **5th Grade Math Proficiency and 8th Grade Math Proficiency:** Decline to set targets employing the Smarter Balanced Assessment until we receive assurances on the reliability and validity of the assessment.
4. **6th Grade Not Chronically Absent and 9th Grade Not Chronically Absent:¹**
Our target is an annual 10% decrease in students not attending 90% of school days, including historically underserved students.
Methodology: Identify the percentage of students who are not meeting the outcome (if 70% of students are meeting the outcome, then 30% are not meeting). Take 10% of students not meeting the outcome (10% of 30% is

¹ We continue to be concerned about the deficit language that is used in the Achievement Compact.

3%) and apply that 10% to identify the target (70% + 3% = 73% is the target).

5. **9th Grade on Track:** In line with previous milestone targets, our target is to increase this metric by 5% each year and a 5% closure of the achievement gap.

Methodology: The deadline for submitting the 9th grade credits was the end of July and PPS received an extension until the end of August. This still does not allow for us to account for all of our credits earned over the summer. We request that the future deadline for this metric be extended to mid-September and we will set our target for a 5% increase.

College and Career Ready: Are students completing high school ready for college or career?										
	2008-09 Cohort	Disadvantaged	2009-10 Cohort	Disadvantaged	2010-11 Cohort	Disadvantaged	2011-12 Cohort Goal	Disadvantaged Goal	2014-15 Cohort 4-yr. Goal	Disadvantaged 4-yr Goal
4-Year Graduation Rate	63.1	54.0	66.9	56.7	NA	NA	73.9	67.5		
5-Year Completion Rate	79.7	73.8	NA	NA	89.7	86.6				
3+ College Level Courses	NA	NA	NA	NA	NA	NA	30.5	19.7		
Post-Secondary Enrollment	66.4	59.3	NA	NA	NA	NA	80.7	76.2		

Progression: Are students making sufficient progress toward college and career readiness?										
	All Students 2011-12	Disadvantaged	All Students 2012-13	Disadvantaged	All Students 2013-14	Disadvantaged	Goal (All) 2014-15	Disadvantaged Goal	4-Year Goal (All) 2017-18	Disadvantaged 4-yr Goal
Kinder Assessment Participation	NA	NA	NA	NA	92.6	91.6	95	95		
3rd Grade Reading Proficiency	76.4	63.2	75.3	61.3	74.3	59.6				
5th Grade Math Proficiency	65.5	50.3	67.3	51.1	67.7	50.1				
6th Grade Not Chronically Absent	89.4	85.4	89.5	86.1	93.0	91.2	93.7	92.1		
8th Grade Math Proficiency	66.7	51.5	64.5	49.1	67.2	50.0				
9th Grade On Track to Graduate	NA	NA	NA	NA	83.2	74.7	88.2	79.7		
9th Grade Not Chronically Absent	79.9	73.1	81.5	74.8	84.3	78.3	85.9	80.5		

Equity: Are students succeeding across all buildings and populations?					
	2012-13	2013-14	2014-15	2015-16 Goal	4-Year Goal (2018-19)
Priority & Focus Schools (Includes schools with lowest overall rating on Oregon Report Card)	NA	16	18	18	

Local Priorities: What other measures reflect key priorities in the district? (Optional, up to 3)										
	All Students 2011-12	Disadvantaged	All Students 2012-13	Disadvantaged	All Students 2013-14	Disadvantaged	Goal (All) 2014-15	Disadvantaged	4-Year Goal (All) 2017-18	Disadvantaged 4-yr Goal

Investment: What is the public investment in the district? (Does not include capital investments)				
	2012-13 (Actual)	2013-14 (Budgeted)	2014-15 (Budgeted)	2014-15 QEM calculation of district share
Formula Revenue	\$339,960,652	\$371,576,653	\$393,503,602	\$472,559,307
Local Revenue (Not passed through formula)			\$93,243,000	
Federal Revenue			0	
State Grants (Not passed through formula)			0	

KEY for 20142-015 ACHIEVEMENT COMPACT
Italics Bold = District provided goal
Bold = ODE provided outcome
Italics = District provided optional field
 NA = Not Available

Equity: Are students succeeding across all buildings and populations?

2008-09 Cohort									
	Economically Disadvantaged	Limited English Proficient	Students with Disabilities	Black (Not of Hispanic origin)	Hispanic origin	American Indian / Alaska Native	Pacific Islander	Asian (Not included in Disadvantaged)	TAG (Not included in Disadvantaged)
4-Year Graduation Rate	55.8	47.5	31.0	52.6	54.2	29.0	61.2	76.5	89.4
5-Year Completion Rate	76.6	57.1	63.7	72.2	68.8	59.0	80.0	80.7	95.7
3+ College Level Courses									
Post-Secondary Enrollment	58.1	46.8	44.5	65.6	48.9	42.3	58.8	81.8	81.2
2011-12 Sub-group Outcomes									
	Economically Disadvantaged	Limited English Proficient	Students with Disabilities	Black (Not of Hispanic origin)	Hispanic origin	American Indian / Alaska Native	Pacific Islander	Asian (Not included in Disadvantaged)	TAG (Not included in Disadvantaged)
Kinder Assessment Participation									
3rd Grade Reading Proficiency	60.3	48.5	55.4	51.5	55.8	60.0	60.5	75.7	99.8
5th Grade Math Proficiency	47.7	40.5	37.6	32.3	49.1	50.0	35.7	75.7	97.4
6th Grade Not Chronically Absent	84.2	89.1	81.9	84.4	85.5	75.0	88.2	97.4	95.0
8th Grade Math Proficiency	50.6	39.1	31.2	43.6	51.1	38.1	50.0	77.3	97.2
9th Grade On Track to Graduate									
9th Grade Not Chronically Absent	71.2	79.0	69.6	74.5	70.7	76.1	71.4	88.0	91.7
2009-10 Cohort									
	Economically Disadvantaged	Limited English Proficient	Students with Disabilities	Black (Not of Hispanic origin)	Hispanic origin	American Indian / Alaska Native	Pacific Islander	Asian (Not included in Disadvantaged)	TAG (Not included in Disadvantaged)
4-Year Graduation Rate	57.7	50.8	37.7	53.1	57.2	44.4	56.7	80.3	90.6
5-Year Completion Rate									
3+ College Level Courses									
Post-Secondary Enrollment									
2012-13 Sub-group Outcomes									
	Economically Disadvantaged	Limited English Proficient	Students with Disabilities	Black (Not of Hispanic origin)	Hispanic origin	American Indian / Alaska Native	Pacific Islander	Asian (Not included in Disadvantaged)	TAG (Not included in Disadvantaged)
Kinder Assessment Participation									
3rd Grade Reading Proficiency	57.6	42.5	55.8	49.1	54.6	68.6	52.0	72.5	100.0
5th Grade Math Proficiency	46.7	40.8	40.3	34.2	46.8	58.6	40.0	78.7	98.4
6th Grade Not Chronically Absent	84.9	89.6	81.7	84.9	87.6	80.0	87.5	96.7	94.4
8th Grade Math Proficiency	47.5	29.3	28.3	36.7	46.6	62.5	41.9	74.0	98.0
9th Grade On Track to Graduate									
9th Grade Not Chronically Absent	73.2	80.5	74.5	74.9	75.4	70.6	78.3	93.7	89.9

Portland SD 1J Achievement Compact
2014-2015

2010-11 Cohort									
	Economically Disadvantaged	Limited English Proficient	Students with Disabilities	Black (Not of Hispanic origin)	Hispanic origin	American Indian / Alaska Native	Pacific Islander	Asian (Not included in Disadvantaged)	TAG (Not included in Disadvantaged)
4-Year Graduation Rate									
5-Year Completion Rate	88.5	76.6	82.8	86.9	81.9	82.9	91.1	90.7	97.9
3+ College Level Courses									
Post-Secondary Enrollment									
2013-14 Sub-group Outcomes									
	Economically Disadvantaged	Limited English Proficient	Students with Disabilities	Black (Not of Hispanic origin)	Hispanic origin	American Indian / Alaska Native	Pacific Islander	Asian (Not included in Disadvantaged)	TAG (Not included in Disadvantaged)
Kinder Assessment Participation	92.2	93.0	83.5	90.3	93.8	80.8	88.1	94.2	95.5
3rd Grade Reading Proficiency	55.7	35.9	53.6	46.2	51.6	66.7	48.4	69.5	99.5
5th Grade Math Proficiency	46.4	38.7	37.2	29.9	43.2	57.1	42.9	78.5	99.2
6th Grade Not Chronically Absent	90.3	94.7	89.1	92.8	91.6	88.5	95.5	98.2	95.8
8th Grade Math Proficiency	48.3	29.9	25.3	37.2	48.0	34.5	56.0	80.3	98.2
9th Grade On Track to Graduate	73.5	80.6	70.1	68.6	73.5	78.1	65.7	94.6	95.5
9th Grade Not Chronically Absent	77.3	85.7	77.0	76.0	76.1	84.8	75.8	96.7	90.7
2011-12 Cohort Goals									
	Economically Disadvantaged	Limited English Proficient	Students with Disabilities	Black (Not of Hispanic origin)	Hispanic origin	American Indian / Alaska Native	Pacific Islander	Asian (Not included in Disadvantaged)	TAG (Not included in Disadvantaged)
4-Year Graduation Rate	70.5	59.9	52.1	68.6	64.9	61.4	74	81.3	92
5-Year Completion Rate									
3+ College Level Courses	19.6	13	11.8	14.4	21.4	15.1	12.3	40.7	65.1
Post-Secondary Enrollment	75.6	74.3	65.3	80.7	71.1	73.6	89.1	90.4	91.6
2014-15 Sub-group Goals									
	Economically Disadvantaged	Limited English Proficient	Students with Disabilities	Black (Not of Hispanic origin)	Hispanic origin	American Indian / Alaska Native	Pacific Islander	Asian (Not included in Disadvantaged)	TAG (Not included in Disadvantaged)
Kinder Assessment Participation	95	95	95	95	95	95	95	95	95
3rd Grade Reading Proficiency									
5th Grade Math Proficiency									
6th Grade Not Chronically Absent	91.3	95.2	90.2	93.5	92.4	89.7	96	98.4	96.2
8th Grade Math Proficiency									
9th Grade On Track to Graduate	75.7	83.6	72.1	69.8	76.7	80	67.9	98.7	99.3
9th Grade Not Chronically Absent	74.2	87.1	79.3	78.4	78.5	86.3	78.2	97	91.6
2014-15 Cohort Goals									
	Economically Disadvantaged	Limited English Proficient	Students with Disabilities	Black (Not of Hispanic origin)	Hispanic origin	American Indian / Alaska Native	Pacific Islander	Asian (Not included in Disadvantaged)	TAG (Not included in Disadvantaged)
4-Year Graduation Rate									
5-Year Completion Rate									
3+ College Level Courses									
Post-Secondary Enrollment									

2017-18 Sub-group Goals									
	Economically Disadvantaged	Limited English Proficient	Students with Disabilities	Black (Not of Hispanic origin)	Hispanic origin	American Indian / Alaska Native	Pacific Islander	Asian (Not included in Disadvantaged)	TAG (Not included in Disadvantaged)
Kinder Assessment Participation									
3rd Grade Reading Proficiency									
5th Grade Math Proficiency									
6th Grade Not Chronically Absent									
8th Grade Math Proficiency									
9th Grade On Track to Graduate									
9th Grade Not Chronically Absent									

KEY for 20142-015 ACHIEVEMENT COMPACT
<i>Italics Bold = District provided goal</i>
Bold = ODE provided outcome
<i>Italics = District provided optional field</i>
NA = Not Available

Portland Public Schools
Achievement Compact for Board Discussion

Achievement Compacts Indicator	All Students					Historically Underserved Students				
	2012-13		2013-14		2014-15	2012-13		2013-14		2014-15
	Goal	Actual	Goal	Actual	Goal	Goal	Actual	Goal	Actual	Goal
4-year graduation rate ¹	62.0%	63.1%	67.5%	66.9%	73.9%	52.0%	54.0%	59.0%	56.7%	67.5%
5-year completion rate ²	72.0%	79.4%	83.3%	79.7%	89.7%	65.0%	73.2%	78.0%	73.8%	86.6%
3+ college level courses ¹			20.8% ³	22.8%	30.5%			9.5% ³	10.8%	19.7%
Post-secondary enrollment ¹	76.0%	70.1%	76.0%	66.4%	80.7%	70.0%	62.2%	70.3%	59.3%	76.2%
Kinder assessment participation			95.0%	92.6%	95.0%			95.0%	91.6%	95.0%
3rd grade reading proficiency	74.0%	75.3%	87.5%	74.3%		61.0%	61.3%	79.6%	59.6%	
5th grade math proficiency		67.3%	72.1%	67.7%			51.1%	59.7%	50.1%	
6th grade not chronically absent	89.0%	89.5%	91.4%	93.0%	93.7%	87.0%	86.1%	88.2%	91.2%	92.1%
8th grade math proficiency		64.5%	73.0%	67.2%			49.1%	60.7%	50.0%	
9th grade credits earned			96.2% ⁴	81.3%	88.2%			88.5% ⁴	72.0%	79.7%
9th grade not chronically absent		81.5%	83.7%	84.3%	85.9%		74.8%	78.2%	78.3%	80.5%

¹2012-13 goal and actual are for the 2008-09 cohort. 2013-14 goal and actual are for the 2009-10 cohort. 2014-15 goal is for the 2010-11 cohort.

²2012-13 goal and actual are for the 2007-08 cohort. 2013-14 goal and actual are for the 2008-09 cohort. 2014-15 goal is for the 2009-10 cohort.

³This indicator changed and 2013-14 goals were set on the old indicator. 2013-14 actual are baseline using the new indicator.

⁴This goal was originally set on a 5% increase each year from the 2011-12 baseline data. However, it should have been a 5% increase over the most recent year's data. Following this methodology, the 2013-14 goal should have been 89.3% for all students and 79.8 for historically underserved students.

PPS Research, Evaluation & Assessment—10/03/2014jws

Goals Setting Methodology

4-year graduation rate	100% of meeting the indicator by 2024-25 (first graduating cohort under 40-40-20 goal). Baseline year is 2007-08.
5-year completion rate	100% of entering freshman students meeting the indicator by 2017-18 (the 2013-14 9 th grade cohort – will be 5 th year completers in 2017-18). Because growth to 2007-08 data exceeded original targets, have reset targets using 07-08 data.
3+ College Classes	100% of students meeting the indicator by 2024-25 (first graduating (2020-21) cohort under 40-40-20 goal). compacts. Because of state changes to this goal, reset baseline year to 2013-14 using baseline data.
Postsecondary enrollment	100% of students meeting the indicator by 2024-25 (first graduating (2020-21) cohort under 40-40-20 goal). Baseline year is 2006-07 cohort.
Kindergarten assessment participation	Set the target at 95%.
3 rd grade reading	100% of 2012-13 kindergartners meeting the indicator by 3 rd grade in 2015-16.
5 th grade math	Reduce the gap from actual to 100% by 10% each year, using 2011-12 as baseline (i.e., set the gap reduction based on baseline and stuck with that trajectory – did not reset trajectory each year based on new performance).
6 th grade attendance	Reduce the gap from actual to 100% by 10% each year, using 2011-12 as baseline. Decided to reset the trajectory based on 2013-14 data because actual exceeded target.
8 th grade math	Reduce the gap from actual to 100% by 10% each year, using 2011-12 as baseline (i.e., set the gap reduction based on baseline and stuck with that trajectory – did not reset trajectory each year based on new performance).
9 th grade credits	Target is 5% above the most recent actual data.
9 th grade attendance	Reduce the gap from actual to 100% by 10% each year, using 2011-12 as baseline. Decided to reset the trajectory based on 2013-14 data because actual exceeded target.

PPS Research, Evaluation & Assessment—10/03/2014jws



Board of Education Informational Report

MEMORANDUM

Date: October 3, 2014

To: Members of the Board of Education

From: Melissa Goff, Assistant Superintendent of Teaching and Learning
Mary Pearson, Senior Director of Special Education

Subject: Coordinated Early Intervening Services Plan

Board members have requested information on the Oregon Department of Education directive for PPS to set aside 15% of IDEA funding to support general education services targeted at reducing disproportionate exclusionary discipline of black students. Attached, Board members will find information regarding the finding from ODE, our submitted plan to directly address disproportionality in discipline, and the PowerPoint presentation to be shared with the Board on Monday evening.

Notification of Significant Disproportionality and the funds required for use under CEIS

School District: Portland Public School District 1J

Date: April 21st, 2014

Area of Significant Disproportionality:

Area: Long-Term Discipline Race/Ethnic category: Black

A finding of Significant Disproportionality, under the Individuals with Disabilities Educational Act (IDEA), requires the Oregon Department of Education to impose fiscal sanctions on the district including:

- Restricting the ability of the district to lower its maintenance of effort base.
- Requiring the district to utilize 15% of its IDEA grant to particularly target the specific Significant Disproportionality issue.
- Removing the right of the district to use up to 15% of its IDEA grant for permissive Coordinated Early Intervening Services (CEIS) activities.

The following amounts have been calculated from the 2013-2014 Final IDEA Part B Awards.

Funds	Part B Final
2013-14 IDEA Part B, Sections 611 and 619 Gross Amount	\$9,783,395.40
15% CEIS Obligation	\$1,467,509.31

These funds are available for obligation from July 1, 2014 through September 30, 2016. The funds must be used during the period of their availability for obligation and must be used for comprehensive CEIS whether or not the Significant Disproportionality is resolved during the time that the funds are available.

Please note: The amounts listed under Part B Final will need to be adjusted for the exact amount of the 2014-15 Final IDEA Part B, Section 611 and 619 Gross Award.

District Actions--Please respond to the following expectations IDEA Part B 618(d) (34 CFR §300.226):

- Please code all expenditures for Coordinated Early Intervening Services under Area of Responsibility 340 from the state accounting manual.
- In anticipation of upcoming federal reporting requests, by June of the **2013-2014** school year please establish and plan to submit:
 - An acknowledgment of this finding and a brief summary of any CEIS activities intended for the 2014-2015 school year related to potential program improvements or to any review and/revision of district policies. **Please note:** Any revisions to policy or procedure will require public reporting on the revisions.
- In anticipation of upcoming federal reporting requests, by June of the **2014-2015** school year please establish and plan to submit a revenue and expenditure report that includes the following information:
 - Total number of children receiving CEIS under the IDEA in the district during the 2014-2015 school year.
 - Total number of children who received CEIS under IDEA any time in the past two years 2012-2013, 2013-2014, (2014-2015) and received special education and related services in the 2014-2015 school year.

Thank you for your attention to this information, if you have questions related to the obligation of Significant Disproportionality, please contact please contact Sarah Drinkwater at sarah.drinkwater@state.or.us or (503) 947-5702.

Significant disproportionality has been identified for white students who received long-term discipline. As outlined below, Portland Public School District 1J exceeds the threshold:

1. Number of Students Who received Long-term Discipline by Race/Ethnicity is Greater than or Equal to 10; AND								
Discipline Incidents*	Native America	Asian	Black	Pacific Islander	Hispanic	White	Multiple Race	Total
Number of Students	0	0	19	0	5	13	1	38
* See table at the bottom of this page for the race/ethnicity distribution for the district's total Special Education population.								
2. + 20% Difference in the Discipline Incidents Data from the Overall District Population by Race/Ethnicity; AND								
Discipline Incidents	Native America	Asian	Black	Pacific Islander	Hispanic	White	Multiple Race	Total
Percent of Students	0.00%	0.00%	50.00%	0.00%	13.16%	34.21%	2.63%	100.00%
Fall Membership								
Number of Students	508	3482	4852	389	6696	23999	2845	42771
Percent of Students	1.19%	8.14%	11.34%	0.91%	15.66%	56.11%	6.65%	100.00%
20% Greater than Percent of Students	1.43%	9.77%	13.61%	1.09%	18.79%	67.33%	7.98%	120.00%
3. Weighted Risk Ratio of > 4.0								
Discipline Incidents	Native America	Asian	Black	Pacific Islander	Hispanic	White	Multiple Races	
Weighted Risk Ratio	0.00	0.00	5.02	0.00	1.13	0.88	0.65	
Explanations:								
1. There are 19 black students who received long-term discipline, which is greater than the minimum 'n' size of 10.								
2. Black students make up 50.00% of all special education students who received long-term discipline. Black students make up 11.34% of the total district population. 20% greater than 11.34% is 13.61% [calculation: 11.34% * 1.2 = 13.61%]. 50.00% is greater than the 13.61% threshold.								
3. The weighted risk ratio for black students who received long-term discipline is 5.02, which is greater than the 4.0 threshold. This means black students are 5.02 times as likely to receive long-term discipline.								
Additional Information:								
Total Special Education Child Count by Race/Ethnicity								
Special Education Child Count	Native America	Asian	Black	Pacific Islander	Hispanic	White	Multiple Race	Total
Number of Students	103	306	970	48	1164	3352	425	6368
Percent of Students	1.62%	4.81%	15.23%	0.75%	18.28%	52.64%	6.67%	100.00%
Data Sources:								
Discipline incidents data is from the 2012 Discipline Incidents collection, the Fall membership data is from the 2012 Fall Membership Collection, and the Special Education data is from the December 2012 Special Education Child Count. All data is based on the District responsible for FAPE (Free Appropriate Public Education).								

Report prepared on 04/21/2014

Purpose of Guidance

The Office of Special Education Programs issues this guidance to provide States with information regarding the use of funds provided under Part B of the Individuals with Disabilities Education Act by local educational agencies (LEAs) to develop and implement coordinated early intervening services (CEIS) for students who are currently not identified as needing special education.

This CEIS guidance represents the Department's current thinking on this topic. It does not create or confer any rights for or on any person. This guidance does not impose any requirements beyond those included under applicable laws and regulations.

If you are interested in commenting on this guidance, please email your comments to OSERSguidancecomments@ed.gov and include CEIS in the subject of your email or write us at the following address: Patricia Guard, U.S. Department of Education, Potomac Center Plaza, 550 12th Street, SW, room 4108, Washington, DC 20202.

MEMORANDUM

**TO: Chief State School Officers
State Directors of Special Education**

**FROM: William W. Knudsen
Acting Director
Office of Special Education Programs**

**SUBJECT: Coordinated Early Intervening Services (CEIS) Under
Part B of the Individuals with Disabilities Education Act (IDEA)**

The Individuals with Disabilities Education Improvement Act amended the IDEA to allow, and sometimes require, local educational agencies (LEAs) to use funds provided under Part B of the IDEA for CEIS. This new provision, which is found in section 613(f) of the IDEA (20 U.S.C. §1413(f)) and the regulations in 34 CFR §300.226 permit LEAs to use Part B funds to develop and provide CEIS for students who are currently not identified as needing special education. The rationale for using IDEA funds for CEIS is based on research showing that the earlier a child's learning problems or difficulties are identified, the more quickly and effectively the problems and difficulties can be addressed and the greater the chances that the child's problems will be ameliorated or decreased in severity. Conversely, the longer a child goes without assistance, the longer the remediation time and the more intense and costly services might be.

From the perspective of the interests of the child, and for administrative, fiscal, and instructional reasons, providing CEIS is a sound policy. As the Department stated in the Analysis of Comments and Changes section in the final IDEA Part B regulations, published on August 14, 2006, allowing schools to use some Part B funds for CEIS has

the potential to benefit both special education and general education. CEIS can benefit general education by reducing academic and behavioral problems in the general education environment. CEIS can also benefit special education by ensuring that students are appropriately referred to special education, which would reduce referrals for special education and related services for needs that could have been addressed with relatively simple general education interventions. (71 FR 46540, 46626-46627 (Aug. 14, 2006)).

The IDEA and its implementing regulations permit LEAs to use not more than 15 percent of the amount the LEA receives under Part B of the IDEA, less any amount reduced by the LEA pursuant to 34 CFR §300.205 (adjustment to local fiscal efforts), to develop and implement CEIS. See 34 CFR §300.226. The regulations also specify:

- how CEIS funds may be spent;
- on whom CEIS funds may be spent;
- the reporting requirements for LEAs providing CEIS;
- the requirement for using CEIS funds by an LEA identified as having significant disproportionality based on race or ethnicity; and
- the relationship of CEIS to maintenance of effort requirements (34 CFR §§300.226, 300.646(b) and 300.205(d)).

The Department has received a number of requests to clarify the use of IDEA funds and other Federal funds for CEIS, including the provision in 34 CFR §300.646 that requires an LEA to reserve the maximum amount of funds available for comprehensive CEIS if there is significant disproportionality based on race or ethnicity with respect to the identification of children with disabilities; the identification of children in specific disability categories; the placement of children with disabilities in particular educational settings; or the incidence, duration, and type of disciplinary actions, including suspensions and expulsions.

The purpose of this memorandum is to provide guidance on CEIS, including the use of CEIS funds by LEAs identified as having significant disproportionality based on race or ethnicity, and on the relationship of CEIS to response to intervention (RTI). In addition to this guidance, the Department has available on its Web site, IDEA.ed.gov, several resources that might be of assistance to States and LEAs in implementing CEIS, including a topic brief, a video clip, questions and answers, and a professional development module created and disseminated in cooperation with the National Dissemination Center for Children with Disabilities funded by the Office of Special Education Programs (OSEP).

Coordinated Early Intervening Services (CEIS)

1. What are CEIS?

CEIS are services provided to students in kindergarten through grade 12 (with a particular emphasis on students in kindergarten through grade three) who are not

currently identified as needing special education or related services, but who need additional academic and behavioral supports to succeed in a general education environment. The IDEA (20 U.S.C. §1413(f)(2)) and its regulations (34 CFR §300.226(b)) identify the activities that may be included as CEIS: (1) professional development for teachers and other school staff to enable such personnel to deliver scientifically based academic and behavioral interventions, including scientifically based literacy instruction, and, where appropriate, instruction on the use of adaptive and instructional software; and (2) providing educational and behavioral evaluations, services, and supports, including scientifically based literacy instruction.

For example, an LEA might use CEIS to provide behavioral interventions to nondisabled students who receive a certain number of disciplinary office referrals, perhaps as a part of a Positive Behavioral Interventions and Support (PBIS) initiative. CEIS also might be used to help fund reading or math specialists to work with nondisabled students who have not reached grade-level proficiency in those subjects, or to fund after-school tutoring for nondisabled students who score below “basic” on Statewide assessments.

Section 613(f)(5) of the IDEA also states that CEIS funds may be used to carry out services aligned with activities funded by and carried out under the Elementary and Secondary Education Act of 1965, as amended (ESEA), if IDEA funds are used to supplement, and not supplant, funds made available under the ESEA for those activities. Thus, if the IDEA funds do not supplant ESEA funds, they may be used to supplement school improvement activities conducted under other programs, such as Titles I or III, that are being implemented in an LEA. For more information on the supplement not supplant requirements, please see Question 24.

2. *Who may receive CEIS?*

Section 613(f)(1) of the IDEA permits LEAs to use IDEA funds for CEIS for students in kindergarten through grade 12 (with a particular emphasis on students in kindergarten through grade three) who are not currently identified as needing special education or related services, but who need additional academic and behavioral support to succeed in a general education environment. See also 34 CFR §300.226(a). Children who are not yet in kindergarten may not receive CEIS. The preamble to the IDEA Part B regulations clarifies that students who received special education in the past, but are not currently receiving special education, are eligible to receive CEIS. (71 FR 46540, 46626 (Aug.14, 2006)).

An LEA determines which students need additional support. For example, an LEA might consider factors such as performance on reading or math assessments, disciplinary referrals, or suspension and expulsions. If an LEA chooses to use CEIS funds to support school-wide interventions,¹ it must be able to provide documentation that CEIS funds were used to provide services only to students in need of additional support and that other

¹ School-wide interventions, as used in this memorandum, are interventions that are implemented throughout a school. The reference to school-wide interventions is not a reference to school-wide programs under section 1114 of the ESEA.

funds were used to fund the school-wide intervention for special education students and students who do not need additional support.

3. *When is provision of CEIS required?*

Under 34 CFR §300.646(b)(2), if a State identifies significant disproportionality based on race or ethnicity in an LEA with respect to the identification of children as children with disabilities, the identification of children in specific disability categories, the placement of children with disabilities in particular educational settings, or the taking of disciplinary actions, the LEA must use the maximum amount (15 percent) of funds allowable for comprehensive CEIS for children in the LEA, particularly, but not exclusively, for children in those groups that were “significantly overidentified.”

4. *May an LEA limit comprehensive CEIS solely to members of the racial or ethnic group for which significant disproportionality was identified?*

No. The requirement in 34 CFR §300.646(b)(2) is to provide comprehensive CEIS to serve “children in the LEA, particularly, but not exclusively, children in those groups that were significantly overidentified.” For example, assume an LEA’s data show significant disproportionality in the identification of African-American students as children with disabilities and that the majority of these students are identified in 4th and 5th grades in six of the LEA’s 15 elementary schools. In this case, one appropriate way an LEA could implement CEIS would be to direct CEIS funds to all nondisabled 3rd and 4th grade children in need of additional academic or behavioral support in those six schools. It would not be appropriate, however, for the LEA to limit eligibility for CEIS only to nondisabled 3rd and 4th grade African-American students in those schools who were in need of additional academic or behavioral support. In this example, the services would be provided to 3rd and 4th grade students in order to intervene prior to the grade when significant disproportionality was identified.

5. *How may an LEA use CEIS funds for professional development?*

CEIS funds may be used to provide professional development to all personnel who are responsible for students who need additional academic and behavioral supports to succeed in a general education environment, but who have not been identified as needing special education. Under limited circumstances personnel who are solely responsible for students receiving special education services or students who do not need additional support may participate in professional development funded with CEIS funds. These personnel may participate so long as the cost of the professional development does not increase, the quality of the professional development does not decrease, and including those personnel would not exclude other personnel who are responsible for students who need additional support but have not been identified as needing special education.

6. *What are the reporting requirements for CEIS?*

The regulations require, in 34 CFR §300.226(d), each LEA that implements CEIS to report to the State on the number of children who received CEIS and the number of those children who subsequently received special education and related services under Part B

during the preceding two-year period (i.e., the two years after the child has received CEIS). (71 FR 46540, 46628 (Aug. 14, 2006)). States and LEAs must maintain these records for audit and monitoring purposes but are not required to report these data to the Department unless requested to do so.

7. *How should an LEA count and track students who received CEIS when funds are used for professional development or a school-wide intervention initiative?*

To ensure consistency across LEAs in a State, each State should develop a method for its LEAs to count and track students who are served by personnel who participated in professional development activities supported with CEIS funds. It would be appropriate for an LEA to count, and subsequently track for two years, the number of students in need of additional support who received instruction from personnel who participated in the professional development program. It would not be appropriate to count every student who was taught by these personnel if some of the students were not in need of additional support or were receiving special education services. An LEA should only count the students and the personnel who participated in the professional development program in the year(s) of or the year(s) immediately after the training, rather than counting the students and those personnel each year after the training. A similar method might be used to count students who benefit from a school-wide intervention initiative supported with CEIS funds. Students who meet the LEA's criteria of being in need of additional support and participate in the initiative should be counted as receiving CEIS in the year(s) of or the year(s) immediately following the initiative and tracked for the following two years. Students who participate in an initiative for more than one year should be counted each year they participate.

8. *How should an LEA count and track students who received CEIS when funds are used to provide behavioral and educational evaluations?*

LEAs may use CEIS funds to provide behavioral and educational evaluations to determine the supports that are needed by students to succeed in a general education environment. However, funds may not be used for evaluations that are intended for use in determining eligibility for special education and related services. Students who are evaluated to determine the supports necessary for success in a general education environment should be counted as receiving CEIS in the year of or the year immediately following the evaluation and tracked for the following two years.

CEIS and Response to Intervention (RTI)

9. *What is RTI?*

There are a number of RTI frameworks, and while the Department does not endorse a particular RTI framework, several core characteristics tend to be present in RTI. These characteristics are: (1) high-quality, evidence-based instruction in general education settings; (2) screening of all students for academic and behavioral problems; (3) two or more levels (sometimes referred to as “tiers”) of instruction that are progressively more

intense and based on the student's response to instruction; and (4) continuous monitoring of student performance.

10. How may CEIS funds be used to implement RTI?

CEIS funds may be used to support RTI as long as the CEIS funds are used for services to nondisabled students in need of additional academic or behavioral support and supplement, not supplant, other funds used to implement RTI. For further information on the supplement not supplant requirements for CEIS, please see Question 24. LEAs must ensure that CEIS funds are used to provide services only to students who need additional academic and behavioral support, and not to students who currently receive special education and related services. See 34 CFR §300.226(a).

For example, one RTI framework includes a three-level continuum of instructional support. In this framework, tier one applies to all students in a general education setting. It would not be appropriate to use CEIS funds for tier one activities that support these students because these activities are designed to provide high-quality instruction to the entire class or school and not principally intended to address the needs of students who are struggling. Tier two activities provide specialized small group instruction for students determined to be at risk for academic and behavioral problems. It would be appropriate to use CEIS funds to support these tier two activities for at-risk, general education students. If students who are receiving special education and related services participate in the small group instruction, it would not be appropriate for CEIS funds to be used for these students as CEIS may not be provided to students that are currently identified as needing special education or related services. Tier three includes specialized individualized instructional or behavioral support for students with intensive needs. As in the case of tier two activities, CEIS funds could be used for activities that support general education students at risk for academic and behavioral problems, but could not be used for students who are receiving special education or related services.

CEIS and Significant Disproportionality

11. What are the requirements for determining significant disproportionality and the use of IDEA funds for comprehensive CEIS?

Section 618(d) of the IDEA and the implementing regulations in 34 CFR §300.646 require States to collect and examine data to determine if significant disproportionality based on race or ethnicity is occurring in States and LEAs with respect to the following: (1) the identification of children as children with disabilities; (2) the identification of children as children with a particular disability; (3) the placement of children with disabilities in particular educational settings; and (4) the incidence, duration, and type of disciplinary actions, including suspensions and expulsions. This requirement is different from the requirement to determine disproportionate representation based on inappropriate identification that is reported in the IDEA State Performance Plan (SPP) and Annual

Performance Reports (APR) in Indicators 9 and 10.² One important difference is that the determination of significant disproportionality does not include a review to determine whether the disproportionality is the result of inappropriate identification, as does the determination of disproportionate representation as the result of inappropriate identification. In the case of a determination of significant disproportionality, a State must require any LEA identified as having significant disproportionality in any of the four above-mentioned analysis categories to reserve the maximum amount of funds for comprehensive CEIS.

12. *How may States define significant disproportionality and disproportionate representation?*

OSEP's April 24, 2007 memorandum, Disproportionality of Racial and Ethnic Groups in Special Education,³ provides important guidance on the disproportionate representation requirements in 34 CFR §300.600(d)(3) and the significant disproportionality requirements in 34 CFR §300.646. States are required to provide a definition of "disproportionate representation that is the result of inappropriate identification" in the SPP pursuant to 34 CFR §300.600(d)(3).

States have a separate obligation, under 34 CFR §300.646, to examine data to determine whether significant disproportionality based on race or ethnicity is occurring, as described above. While it is permissible for States to use the same or similar definitions for both "disproportionate representation" and "significant disproportionality," States' definitions are usually different. For example, one possible way to set different, but coordinated, definitions is through a multi-level approach in which one level could be any numerical disproportionality; another level could be numerical disproportionality defined by the State to be disproportionate representation, which triggers a review to determine whether the disproportionate representation is the result of inappropriate identification; and another level could be numerical disproportionality that the State defines as significant disproportionality, which triggers the requirement to set aside the maximum amount for comprehensive CEIS.

It is important to consider some distinct differences between the requirements of 34 CFR §§300.600(d)(3) and 300.646. For example, under 34 CFR §300.600(d)(3), SPP Indicators 9 and 10 only require States to look at identification data, including by disability category, and are only concerned with disproportionality that is the result of inappropriate identification. In contrast, for purposes of determining whether an LEA must set aside 15 percent of its IDEA funds for comprehensive CEIS under 34 CFR §300.646(b)(2), States must examine the numerical data in four analysis categories -- identification of children with disabilities, identification of children with disabilities in a particular impairment category, placement of children in particular educational settings, and the taking of disciplinary actions. Further, 34 CFR §300.646 requires the

² More information on Indicators 9 and 10 of the SPP and APR can be found in the SPP and APR forms, available online at: <http://www.ed.gov/policy/speced/guid/idea/monitor/index.html>.

³ This memorandum is available online at: http://www.rrfcnetwork.org/images/stories/FRC/spp_mat/2007_October/dr%20memorandum%20final%204-24%20signed.doc.

identification of all significant disproportionality, whether or not it is the result of inappropriate identification.

13. Should States consider both overrepresentation and underrepresentation of racial and ethnic minorities when determining significant disproportionality under 34 CFR §300.646?

No. For purposes of §300.646, it is acceptable for States to consider only overrepresentation by race or ethnicity, rather than underrepresentation by race or ethnicity. During its deliberations on section 618(d) of the 2004 amendments to the IDEA, Congress expressed concern with the overrepresentation of racial and ethnic minorities in the identification, placement, or discipline of children with disabilities. The House Committee Report, H.R. Rep. No. 108-77, at 122 (2003), stated, “...the Committee’s desire to see the problems of overidentification of minority children strongly addressed...” Additionally, in drafting the language in section 618(d)(1) of the Act, Congress expressly provided that States must require LEAs identified with significant disproportionality to reserve the maximum amount of funds under section 613(f) to provide comprehensive CEIS to children in the LEA, “particularly, but not exclusively, children in those groups that were significantly overidentified.”

Based on Congress’ expressed desire to address the issue of overrepresentation, States’ resources may be better spent (1) collecting and analyzing data only on significant disproportionality that constitutes overrepresentation based on race or ethnicity in the identification, placement, or discipline of children with disabilities, and (2) ensuring that where such overrepresentation exists, the policies, practices, and procedures are reviewed and revised to comply with the Act, and LEAs use 15 percent of their Part B funds to provide comprehensive CEIS.

14. What must States consider in the analysis of significant disproportionality in the identification and placement of children with disabilities required in 34 CFR §300.646?

In each of its LEAs, a State must examine data to determine if significant disproportionality based on race or ethnicity exists in each of the four analysis categories required by 34 CFR §300.646. When examining data to determine if significant disproportionality exists with respect to the identification of children with particular impairments, it is acceptable for a State to examine the data with regard to children with impairments in only the following six disability categories: specific learning disabilities, mental retardation, speech or language impairments, other health impairments, autism, and emotional disturbance. Because the remaining disability categories typically have very small numbers of children, the Department does not deem disproportionality in the number of children with these disabilities to be significant. However, if a State has identified a problem or has reason to believe that there are issues with other disability categories (i.e., through written complaints, due process filings, etc.), then the State should explore the problems with those categories.

Additionally, with regard to data on placement of children with disabilities in particular educational settings, a State, using the data it collects for reporting under section 618 of the IDEA must, at a minimum, examine data for three of the section 618 reporting categories: children who received educational and related services in the regular class no more than 79 percent of the day and no less than 40 percent of the day; children who received special education and related services in the regular class for less than 40 percent of the day; and children who received special education and related services in separate schools and residential facilities. A State is not required to examine data for children who received special education and related services in homebound or hospital settings, correctional facilities, or in private schools (as a result of parental placement of the child in a private school) because those numbers are typically very small and an LEA generally has little, if any, control over these placements. Additionally, a State is not required to examine data for children who received special education and related services in the regular class for more than 79 percent of the day because the IDEA requires children with disabilities to be placed in the least restrictive environment and, therefore, presumes that placement in the regular classroom is the preferred educational setting.

15. *What must States consider in the collection and examination of disciplinary data in 34 CFR §300.646?*

The regulations in 34 CFR §300.646(a)(3) require States to annually collect and examine data to determine if significant disproportionality based on race or ethnicity is occurring with respect to the incidence, duration, and type of disciplinary action, including suspensions and expulsions. We interpret the term “incidence” to refer to the number of times children with disabilities ages 3 through 21 were subject to disciplinary actions. We interpret the term “duration” to refer to the length of suspensions or expulsions. The type of disciplinary action refers to, at a minimum, data on both in-school and out-of-school suspensions and expulsions, but could also include other disciplinary actions (e.g., exclusion from extracurricular activities). In order to determine if significant disproportionality exists for discipline, a State must consider all three areas (incidence, duration, and disciplinary actions) when examining its data. For example, a State could meet this requirement by determining whether significant disproportionality based on race or ethnicity is occurring in: the number of out-of-school suspensions of 10 days or less; the number of out-of-school suspensions (including expulsions) of greater than 10 days; the number of in-school suspensions of 10 days or less; the number of in-school suspensions of greater than 10 days; and the total number of disciplinary removals.

16. *What funds must be reserved by the LEA for comprehensive CEIS if a State determines significant disproportionality?*

A State must determine significant disproportionality annually and require any LEA that is found to have significant disproportionality based on race or ethnicity to reserve the maximum amount of funds under section 613(f) of the IDEA (15 percent) for comprehensive CEIS either from the funds awarded following the date on which significant disproportionality was determined or from funds awarded from the appropriation for a prior Federal fiscal year (FFY).

The following examples illustrate how funds could be reserved. (Note: The Department expects to begin making awards from FFY 2009 funds on July 1, 2009. FFY 2009 funds, which will begin to become available on July 1, 2009, will be available for obligation at the State and LEA levels until September 30, 2011.)

- a. The State uses data on discipline collected for school year 2007-08, and which is reported in November 2008, to make a determination in February 2009 (prior to when FFY 2009 funds begin to become available on July 1, 2009) that an LEA must set aside funds for comprehensive CEIS. The LEA has three options. The LEA may set aside: (1) 15 percent of the funds that it receives from the FFY 2009 appropriation (available for obligation from July 1, 2009 through September 30, 2011); (2) 15 percent of the funds that it received from the FFY 2008 appropriation (available for obligation from July 1, 2008 through September 30, 2010); *or* (3) 15 percent of the funds that it received from the FFY 2007 appropriation (available for obligation from July 1, 2007 through September 30, 2009).
- b. The State uses data on enrollment or placement collected as of some time between October 1 and December 1, 2008, and which is reported in February 2009, to make a determination in August 2009 (after FFY 2009 funds begin to become available on July 1, 2009) that an LEA must set aside funds for comprehensive CEIS. In this case, the LEA has four options: the three options described above plus one additional option. Because the determination was not made until August, after the funds from the FFY 2009 appropriation have been awarded, the LEA may set aside 15 percent of the funds that it receives from the FFY 2010 appropriation (available for obligation from July 1, 2010 through September 30, 2012).

17. May multiple years of data be used to determine significant disproportionality?

A State must determine significant disproportionality annually. It is appropriate for a State's determination of significant disproportionality to be based on multiple years of data. While a State may aggregate previous years' data or look at trend data, the analysis must include data for the most recent fiscal year as described in Question 16.

18. May a State calculate significant disproportionality differently for the four analysis categories?

It is permissible for a State to use different calculation methods to determine significant disproportionality in the four analysis categories so long as the State can justify the calculation methods for each of the analysis categories and demonstrate that the methods are statistically sound. We recognize that there may be small numbers of students counted in some of the analysis categories, which might impact the reliability and validity of a calculation method. In such cases, a State might need to use a method of identifying significant disproportionality that is different from the method used for another analysis category. For example, a State might choose to use a "risk-ratio formula" to identify significant disproportionality in placement data and a "composition index" to identify

significant disproportionality in identification data. In addition, a State may set its risk ratio or composition index at different points for the four analysis categories. For example, a State might decide to use a risk ratio for placement data that is higher than its threshold for discipline data as long as these differences can be justified. The Department encourages States to use the guidance provided by the Department on methods for calculating disproportionality. This guidance is found at: <http://www.ideadata.org/docs/Disproportionality%20Technical%20Assistance%20Guide.pdf>.

Additionally, if data appear not to be representative in a district that provides services for students with certain disabilities who come from several surrounding districts, it would be appropriate when calculating significant disproportionality to count those students in the “sending district” (i.e., the district that is responsible for ensuring that the student’s individualized education program (IEP) is implemented) and not in the district that is providing services.

19. May a State change its definition of significant disproportionality over time?

Yes. There are circumstances in which it may be appropriate for a State to modify its definition of significant disproportionality over time. For example, a State may make its definition broader as its LEAs improve in the areas of analysis, in order to identify more disproportionality than in previous years. If a State chooses to modify its definition of significant disproportionality for the analyses required under 34 CFR §300.646, the State is not required to recalculate data from previous years based on the revised definition.

20. Should States report on significant disproportionality in the SPP and APR?

States are not required to report on significant disproportionality and CEIS in the SPP/APR unless required by OSEP to do so because of previously identified noncompliance. As described above, the analysis of data to determine significant disproportionality required in 34 CFR §300.646 and the reservation of funds for comprehensive CEIS are separate from the requirement in 34 CFR §300.600(d)(3), which is the basis for Indicators 9 and 10 in the SPP and APR.

Some Fiscal Considerations when Implementing CEIS

21. What amount of IDEA funds may an LEA use for CEIS?

It is important to consider that many of the following fiscal considerations relating to CEIS only apply when an LEA is required to reserve funds for comprehensive CEIS following the identification of significant disproportionality, pursuant to 34 CFR §300.646(b)(2). If a State identifies significant disproportionality in an LEA, the LEA must reserve the maximum amount of funds for comprehensive CEIS. The funds must be used during the period of their availability for obligation and must be used for comprehensive CEIS regardless of whether the significant disproportionality is resolved during the time that the funds are available. If significant disproportionality is not identified and an LEA chooses to use funds for CEIS, the LEA may use up to the

maximum amount allowed for CEIS (15 percent) and may reallocate any unspent funds during the time that the funds are available for obligation.

22. *Should the 15 percent be calculated prior to reductions based on other IDEA requirements?*

Funds awarded to an LEA under both sections 611 and 619 of the IDEA must be included when calculating the 15 percent. An LEA may not reduce the amount it uses for this calculation by any other amount required by the IDEA. For example, an LEA may not deduct funds for equitable services for students parentally-placed in private schools before calculating the 15 percent. An LEA that is required to use funds for comprehensive CEIS because of significant disproportionality must use 15 percent of the total Part B funds awarded to the LEA. An LEA that is not identified as having significant disproportionality but chooses to use Part B funds for CEIS may use up to 15 percent of the total amount, less any funds reduced by the LEA pursuant to 34 CFR §300.205. See 34 CFR §300.226(a).

23. *How does an LEA's use of IDEA funds for CEIS affect its maintenance of effort obligation under IDEA?*

If an LEA is required or chooses to use part of its Part B funds for CEIS, it must consider the effect that the decrease in the available Part B funds might have on the LEA's maintenance of effort obligation. States and LEAs should review the requirements in 34 CFR §§300.205(d) and 300.226(a), and the examples provided in Appendix D to the Part B regulations, to better understand how CEIS and maintenance of effort calculations might affect one another. If an LEA uses additional local funds, or State and local funds, for special education and related services for children with disabilities in place of the Part B funds that are being used to provide CEIS to children who have not been identified as children with disabilities, the higher level of local, or State and local, expenditures becomes the LEA's new maintenance of effort base for the subsequent year.

24. *What are the supplement not supplant requirements for CEIS funds?*

The general non-supplant requirement for IDEA funds in 34 CFR §300.202(a)(3) states that funds provided to LEAs under Part B of the IDEA must be used to supplement State, local, and other Federal funds and not to supplant those funds. This requirement applies to all Part B funds including any used for CEIS. In addition, 34 CFR §300.226(e) states that CEIS funds may be used to carry out CEIS aligned with activities funded and carried out under the ESEA if those funds are used to supplement, and not supplant, funds made available under the ESEA for the activities and services assisted using CEIS funds. The Department will presume that an LEA is in violation of the IDEA's supplement not supplant provisions if it uses IDEA funds in one of the following ways: (1) to provide services that are otherwise required by Federal, State or local law; or (2) to provide services that were paid for with other funds in a prior year, including, if the IDEA funds are used for CEIS activities coordinated with activities funded under the ESEA, and the IDEA funds are used to provide services that were paid for with ESEA funds in the prior year. CEIS may not include services that were provided with other funds in a prior year,

including services that were paid with ESEA funds. An LEA might be able to rebut these presumptions through the presentation of evidence that, even without CEIS funds, the other funds would not have been used in the current year for the activities now paid for with CEIS funds. Additional supplement not supplant provisions apply to Federal funds provided under Titles I and III of the ESEA.⁴ If an LEA chooses to use CEIS funds for activities aligned with activities funded under Titles I and III, it must meet those requirements.

Conclusion

The Department recognizes the complexities of implementing the requirements related to CEIS. We encourage States to utilize the technical assistance resources developed by the Department and available at IDEA.ed.gov. If you have further questions about CEIS and RTI or CEIS and significant disproportionality, please contact your OSEP Part B State contact. As noted above, we welcome your comments on this guidance.

⁴ See section 1120A of Title I and sections 3111 and 3115(g) of Title III regarding the supplement not supplant provisions.

Plan for Coordinated Early Intervening Services (CEIS)
September 2014

Portland Public Schools acknowledges that ODE has found significant disproportionality in the district's use of long-term exclusionary discipline with blacks students identified as eligible for special education based on data from the 12-13 school year.

Background: PPS was last sanctioned based on exclusionary discipline data from 09-10; we received notice from ODE [5/11](#), and implemented CEIS for years 11-12 and 12-13. CEIS funds were used primarily to fund behavior coaches that worked in 8-10 of the most high risk schools for exclusion of black students. The current sanction is based on exclusionary discipline data from the second year of implementation of the previous CEIS plan.

The 12-13 data shows a significant reduction in the overall use of more than 10 days exclusionary discipline (51.5% improvement over 09-10, 227 to 110), a significant reduction in the use of exclusionary discipline with students with disabilities (62.4% improvement over 09-10, 101 to 38) and a significant reduction in the use of exclusionary discipline with black students with disabilities (56.8% over 09-10, 44 to 19). While there has some improvement in reducing the disproportionality gap (from 11.54 in 09-[10](#) to [5.02](#)), the gap is still over the ODE threshold of a weighted risk ratio of 4.

The 19 students on which the current sanction based were enrolled in 13 different schools, and not necessarily in schools with the highest enrollment of black students in the district. We believe that a plan that only targets specific schools will not effectively reach black students attending schools across the district who are at risk of exclusionary discipline. That is why our plan for CEIS is a two-fold and comprehensive.

Outline of plan: We will address this both district wide and in the 12 targeting schools selected.

District Wide- Our plan is to allocate .15 FTE of each school psychologist position to provide CEIS services in the schools they serve. This is in line with National Association of School Psychologists' Model for Comprehensive Integrated School Psychological Services. The school psychologists will receive additional training on taking a leadership role in schools in implementation of Culturally Responsive PBIS (CR-PBIS), restorative justice, and/or other strategies in collaboration with other PPS departments to address the priority of reducing exclusionary discipline, particularly exclusionary discipline of black students. Activities school psychologists may perform to impact the implementation of PBIS include progress monitoring and problem solving, assessment and intervention design, staff training, and adapting and using data to make decisions (Gresham, 2004; Kratochwill, 2007; Horner, Sugai, Todd, & Lewis-Palmer, 2005; Sugai & Horner, 2006).

Timeline-

Sept. 2014-

- Explain sanction and share plan for CEIS to School Psychologists
- Gather baseline data on preventative practice survey
- Convene with School Psychologist advisory group to develop scope and sequence of 2 year Professional Development plan
- Finalize the CEIS plan to submit to ODE

Oct. 2014

- Full day School Psychologist work group
 - Review survey data
 - Vet and finalize Comprehensive and Integrated Service Delivery Model
 - Develop tracking and accountability system for reporting results to ODE

Nov 2014- June 2016

- Monthly School Psychologist advisory group
 - Professional Development
 - Monitor implementation
- Monthly Professional Development and PLC's focused on Comprehensive and Integrated Service Delivery Model
- Annual report to ODE- Oct 2015 and Oct. 2016

Targeted Plan

The 12 targeted schools will be included in our district wide plan and will receive a high level of follow up coaching and support. Through a collaborative process with the Office of Equity, Office of School Performance and the Office of Teaching and Learning, effective strategies that are culturally responsive (CR-PBIS, RJ, co-teaching, peer mentoring etc.) will be identified and supported. The strategies will be integrated in the racial equity framework (Courageous Conversations) and extend the C.A.R.E. (Collaborative Action for Racial Equity) work being used in the schools.

Equity PBIS Coach

The Equity PBIS Coach will augment PPS's current team of Equity TOSA's and PBIS TOSA's. In the 2014-15 school year this TOSA Team will integrate and collaborate on the development and delivery of professional development and coaching on culturally responsive strategies including: pedagogy, student engagement, classroom community, relationship building, restorative practices, targeted interventions, individual supports and data-based decision making in a

multi-tiered system of support. The Equity PBIS Coach will be the functional lead in this work and provide updates for leadership, develop and maintain implementation tools and sustainability plans, in addition to providing professional development and coaching to school staff, community partners and administrators.

Plan for Coordinated Early Intervening Services

2014-2016

What are Coordinated Early Intervening Services?

- Individuals with Disabilities Education Act allows districts to use 15% of IDEA funds for Tier 2 and Tier 3 interventions for General Education and Special Education students

Through our budgeting process for 2014-15, PPS had already opted to use all of the 15% of IDEA funds for CEIS due to our district priority to address ongoing concerns about disproportionate exclusion of students of color.

Requirements of Finding

- 15% of IDEA funds allocated for Tier 2 and Tier 3 behavior supports for General Education and Special Education students
- Summit budget to ODE with coded expenditures for CEIS over the next two years
- Follow annual reporting requirements for number of students served by CEIS

Signs of Improvement (2009-2013)

- All students- 51.5% improvement (227 to 110)
- All Special Education- 62.4% improvement (101 to 38)
- Black students with Disabilities 56.8% improvement (44 to 19)

Given PPS improvement, why does ODE require a Coordinated Early Intervening Services Plan?

- In 2012-13, 19 black special education students were suspended (over 10 days) and/or expelled in 13 different schools
- PPS was over the weighted risk formula threshold when comparing black students who have disabilities' exclusion rates to white students who have disabilities' exclusion rates

Accelerating Gains: Building Staff Strength

- School Psychologists
 - Pre-service training to lead teams in data-based decision making process*
- School Staff Professional Development
 - Culturally Responsive-Positive Behavior Intervention Supports (CR-PBIS)*
 - Restorative Practices*
 - Functional Behavior Assessment (FBA)*
 - Team Initiated Problem Solving (TIPS)*

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

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October 6, 2014

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Purchases, Bids, Contracts

The Superintendent RECOMMENDS adoption of the following item:

Number 4964

RESOLUTION No. 4964

Expenditure Contracts that Exceed \$150,000 for Delegation of Authority

RECITAL

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

RESOLUTION

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

NEW CONTRACTS

Contractor	Contract Term	Contract Type	Description of Services	Contract Amount	Responsible Administrator, Funding Source
CDW-G	10/7/2014	Purchase Order PO XXXXX	Purchase of 150 tech bundles for Phase II of the Tech Bundle project.	Not-to-exceed \$370,000	J. Klein Fund 407 Dept. 5581 Project A1007
Piper Jaffray	7/1/2014 through 6/30/2017	Personal Services PS 6XXXX	Financial advisory services, including the evaluation of possible debt financing options.	\$180,000	D. Wynde Fund 101 Dept. 5528

NEW INTERGOVERNMENTAL AGREEMENTS (“IGAs”)

Contractor	Contract Term	Contract Type	Description of Services	Contract Amount	Responsible Administrator, Funding Source
Multnomah Education Service District	9/1/2014 through 6/30/2015	Intergovernmental Agreement IGA 6XXXX	District-wide: Provide the residential three day-two night Outdoor School Program to District students.	\$780,450	S. Perrins Fund 299 & 101 Dept. 6299 Grant S0260

AMENDMENTS TO EXISTING CONTRACTS

No New Amendments

R. Dutcher

Other Items Requiring Board Action

The Superintendent RECOMMENDS adoption of the following items:

Numbers 4965 and 4966

RESOLUTION No. 4965

Adopting Board Member Expectations and Operating Protocols

RESOLUTION

The Board of Directors of Portland Public Schools approves and adopts the attached *Board Member Expectations and Operating Protocols*.

PORTLAND PUBLIC SCHOOLS
BOARD MEMBER EXPECTATIONS AND OPERATING PROTOCOLS

As elected Board members of Portland Public Schools, our responsibilities are to:

1. Strive to provide the highest quality education for each PPS student using achievement and equity as the fundamental factors for all decision making and actions.
2. Set explicit goals and priorities for the District. Working with the Superintendent, ensure that staff carry out and that students and the community are aware of the goals and priorities.
3. Focus on policy making, monitoring, and evaluation to further these goals and priorities.
4. Hire, set goals for, and evaluate the Superintendent.
5. Respect the role of the Superintendent to manage the District and to direct employees in District and school matters.
6. Make decisions as a whole Board only at public meetings. Recognize that individual members have no authority to take individual action in policy or in district and school administrative matters.
7. Encourage and model constructive public discourse in Board decision making. Respect the right of individual Board members to express their viewpoints and vote their convictions. Once a decision is made, support the full Board and Superintendent in carrying out decisions.
8. Honor the student voice. Ensure strong, effective staff support to encourage student voice.
9. Respect those who express their views on issues related to the District. Solicit input and listen to all perspectives.
10. Actively participate in community events, acting as ambassadors on behalf of the District, as well as in state and/or national events when possible.
11. Strive to cultivate and maintain productive relationships, and work as a team with one another and the Superintendent.

I. Priority Setting and Evaluation

A. Priority Setting

1. The Board will establish, at a public meeting, annual and long-term priorities in alignment with the District's strategic plan and Superintendent's goals. The Board will align their work with District goals and the budget process, and will convene regular retreats to discuss and evaluate the District progress in meeting these priorities.
2. Every six months, the Board will elect two Co-Chairs during one of their public meetings.
3. Board Co-Chairs will meet regularly with the Superintendent and key staff to evaluate past Board meetings and determine the agenda for upcoming Board meetings.
4. In accordance with Board policy and procedure, agenda items for general discussion, presentation, reports, etc., will be established jointly by the Board Co-Chairs and the superintendent. Requests for placing such items on the agenda shall be submitted to the Board office.

The Board Co-Chairs will use the following criteria to consider items for placement on the Board meeting agendas:

- a. Strategic relevance and consistency with the priorities of the Board and the District;
 - b. Comparative importance;
 - c. Immediacy;
 - d. Community interest; and
 - e. Readiness for Board consideration (staff research, preparation, analysis, etc.)
5. Board members wishing to bring new resolutions not on the agenda, or to amend existing resolutions, are asked to provide their proposed resolution or amendment in writing to the Board office in advance of the upcoming Board meeting to allow sufficient time for consideration by Board members. A summary of description may be submitted in place of a resolution or amendment.

In accordance with parliamentary procedure, resolutions that are moved and seconded at a Board meeting will be considered, unless called out of order by the chair; subsidiary motions to postpone, refer or object to a motion may also be moved and seconded.

In accordance with Board policy 1.70.011-P (9) (f), no action shall be taken at any Board meeting on items authorizing an expenditure of money, unless the recommendation for such expenditure appears in preliminary agenda for that meeting.

6. The Board Co-Chairs will regularly check in informally with Board members regarding the Board operations. In addition, the full Board will meet in a retreat mid-year to review operations and progress to date on the Board priorities.

B. Board Professional Development and Evaluation

1. The Board will self-assess its performance at least annually. The Board Co-Chairs will regularly evaluate Board meetings. All Board members are encouraged to provide feedback to the Co-Chairs at any time to improve the Board's performance. The Board will also set explicit priorities as a Board for Board professional development. The Board will annually review the Board Office budget to ensure there are sufficient funds to support the Board's professional development.

C. Superintendent's Evaluation

The Board will establish regular goals for the Superintendent's performance and engage in a process that provides for thoughtful and deliberative assessment of the Superintendent's work.

II. Meetings

- A. Board members agree to attend regularly scheduled Board meetings and work sessions unless a situation occurs that makes attendance impossible. Board members will cooperate in scheduling special meetings and/or work sessions for planning and training purposes, and will advise staff if a Board member is unable to attend or arriving late.
- B. Board members agree to start and end meetings on time.
- C. Board members will be prepared for each meeting by reviewing materials in advance.
- D. Board members agree to uphold the legal requirement for confidentiality on all matters arising from Board executive sessions and any other confidential communications.
- E. Board members agree to communicate with a focus on problem solving. Members will seek to clarify issues by soliciting each other's points of view.
- F. Board members agree to listen carefully and with courtesy when other people are speaking during Board meetings. Discussions between Board members will serve as a model for acceptable public dialogue.
- G. Board members shall cast a vote on all matters except when a conflict of interest arises.
- H. Board members agree that when it is necessary to miss a meeting, that they should review the video of that meeting or otherwise inform themselves of the content of the meeting.
- I. Board members agree that if they must be absent from a meeting, that they will only request to phone into the meeting to cast a vote. Boardroom equipment limits the quality of the transmission for participation in a discussion.

III. Communication

- A. Board members agree to communicate directly with the Superintendent and/or members of the Executive Committee if appropriate if a question arises, or when a concern is voiced by a staff member, student, parent, or other community member with the understanding that the matter will be addressed in a timely manner. To ensure optimal communication, Board members should copy the Superintendent and her Advisor, along with the General Counsel and Board Office Manager on their emails to the Executive Committee, and staff will do the same in its replies. By adhering to this communication loop, it verifies that Board members are receiving timely responses to their communication and that there are not multiple staff members working on the same issue. (These steps do not pertain to inevitable confidential situations that arise).
- B. Board members are requested to NOT directly contact staff who report to Executive Committee members without clearing it through the appropriate Executive Committee member first, as other staff may not be as familiar with Board communication and protocols. There may be case-by-case exceptions to this as determined by the Superintendent (such as key Communications Department staff). This provision is not intended to restrict Board member's ability to visit schools.
- C. Board members agree to communicate directly with the Board Co-Chairs or the Superintendent, as appropriate, when concerns arise about other Board members or

District staff. When disagreeing with other Board members, Board members should maintain a respectful dialogue. Board members should refrain from personally criticizing another Board member or District staff in public.

- D. Board members retain the right to express individual opinions, and when doing so, will clearly state that the opinion is his/hers and not that of the Board.
- E. On occasion, it is beneficial to the Board and the public to have a designated Board spokesperson on a particular issue. In such cases, the Board Co-Chairs may speak for the Board on specific issues, or may designate other Board members to act as a spokesperson. Having a designated spokesperson does not mean that other Board members cannot express their opinions or perspectives about the issue.
- F. Individual personnel issues will be processed consistent with District policy and will not be discussed publicly, rather only with the Superintendent or designee. Specific personnel complaints submitted to the Board or individual Board members will be referred to the Superintendent or designee.
- G. From time to time, the Board may be required to make findings of fact that can be appealed to another government agency (i.e., personnel matters or charter school application hearings). In these situations, no Board member will discuss the substance of the matter with any person(s) directly involved in the issue, other than PPS staff, outside the formal hearing and deliberation process.

IV. Requests for Information

A. Information Requests of Staff

- 1. When Board members have information requests of staff (but do not require any particular decision to be made), the Board member should feel free to communicate their request to any member of the Executive Committee or through the Board Office Manager. The Superintendent or her Advisor should be copied on any written requests to keep her apprised of issues of concern to the Board.
- 2. If the request for information is of such a nature that it will take significant time to compile a response (i.e., more than two hours), the Board member should communicate his/her request to the Superintendent or designee for further direction. The Superintendent can then work with the Board member to determine the most efficient way to provide the information requested.

B. Requests Requiring Decision-Making or Resource Allocation

When a Board member has a request that will require a decision to be made or resources to be allocated, the Board member should send that request to the Superintendent or designee for a response in a timely manner.

C. Responding to Concerns from the Public about District Staff

When Board members are approached by members of the public expressing concerns about District staff and the person requests specific follow-up, the Board member should direct that person to address their concerns to the Superintendent. If a citizen voices a complaint about a particular employee at a public meeting, the Board Chair should direct that person to cease their comments and refer them to the Superintendent.

D. Providing Documents to Board for Review in Advance of Meetings

The Board Co-Chairs and Superintendent will establish the agenda for full Board meetings at least 10 days prior to the Board meeting. Staff and the Superintendent will have the Board book, and any supporting documentation, available at least three days prior to the Board meeting except under extenuating circumstances.

RESOLUTION No. 4966

Adopting the Portland Public Schools Board of Education's 2014-2015 Work Plan

RESOLUTION

The Portland Public Schools Board of Education adopts the attached Work Plan for the 2014-2015 school year.

Board-Designated Areas of Focus	Executive Lead	Reporting to the Board
Continue to focus on successfully meeting all Milestone targets and further embed an even greater sense of urgency throughout the District to do so.	Amanda Whalen	Achievement Compact: October Work Session Graduation Rate: February Work Session
Ensure that all Bond projects continue to be implemented on time and on budget.	CJ Sylvester	Monthly Written OSM Reports Quarterly Presentations from BAC and OSM: November, February, May
Maximize the effectiveness of the Senior Director of Schools role and continue to provide the tools and supports they need in order to ensure our principals are successful and performing their highest and best.	Antonio Lopez	Principal Support and Evaluation: November Work Session School Climate Survey: March
Improve teacher/principal evaluation methodology and further enhance performance reinforcement systems.	Antonio Lopez	Teacher Evaluation: September Work Session Principal Evaluation: November Work Session
Develop and implement a strategy to welcome families as part of the District's Equity work.	Lorenzo Poe	Implementation of Racial Educational Equity Plan: August Presentation, December Work Session

Annual Actions Required	Other Work Identified
Budget (November-June)	Enrollment and Transfer Policy Revision (January, April, June)
Charter School Renewals (March)	Boundary Review (October, January, April, June)
Achievement Compact Approval (October)	Educational Specifications Update and K-8 Adoption (October)
Compliance Report/Division 22 (January)	School Calendar Update (December)
Non-Extensions/Non-Renewals (March)	Equity in Public Purchasing and Contracting (March)

Continue to improve financial reporting and business management processes with an emphasis on providing ready access to deeper analytics.	Chief Financial Officer	Budget Process and Budget Amendments: November-June Work Sessions
Develop and implement a vision and strategy for improving Career Technical Education, hands on and project based learning opportunities for students.	Antonio Lopez	CTE/Career Learning: October, February Work Sessions
Continue toward forging a collaborative working relationship with PAT.	Sean Murray	Teacher Evaluation: September Workload Committee: September, January, April, June
Continue to evolve the culture of the District with an ongoing emphasis on embedding a Continuous Improvement mindset.	Amanda Whalen	Regular Data In Packets School Improvement Plans: November Work Session
Complete the development of and then begin implementing a plan to examine the District's current assessment and testing practices.	Melissa Goff	November Work Session
Review and revise complaint policy and procedures to be more clear and family-friendly.	Jollee Patterson (policy development) Jon Isaacs (implementation)	September Work Session First and Second Reading: September, November ODE Audit Update: July

Superintendent's Evaluation (May)	Affirmative Action Plan (December)
Open Enrollment (February)	Early Childhood Education (December)
Comprehensive Annual Financial Report (December)	
MESD Local Service Plan (February)	
Head Start Adoption of Report (May)	
Legislative Priorities	

Accelerate the increase in our graduation and coompletion rates and work to narrow the achievement gap, with an emphasis on taking steps to ensure students graduate from PPS college and career ready.	Antonio Lopez	Multiple Pathways December Work Session Graduation Rates: February Work Session CTE/Career Learning: October, February HS Action Team Update: November HS Instructional Time and Graduation Rate Audit Update: February
Continue taking steps to ensure that 100% of students are reading at grade level by the end of third grade.	Melissa Goff	Achievement Compact October Work Session 3rd Grade Reading November Work Session
Reduce out-of-school discipline for all students and the disparity in out-of-school discipline between white students and students of color by 50 percent.	Lorenzo Poe	Discipline Data & Strategies: December, January and June Work Sessions

Climate Survey	
ESL Report	

PORTLAND PUBLIC SCHOOLS BOARD MEMBER EXPECTATIONS AND OPERATING PROTOCOLS

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3. Focus on policy making, monitoring, and evaluation to further these goals and priorities.
4. Hire, set goals for, and evaluate the Superintendent.
5. Respect the role of the Superintendent to manage the District and to direct employees in District and school matters.
6. Make decisions as a whole Board only at public meetings. Recognize that individual members have no authority to take individual action in policy or in district and school administrative matters.
7. Encourage and model constructive public discourse in Board decision making. Respect the right of individual Board members to express their viewpoints and vote their convictions. Once a decision is made, support the full Board and Superintendent in carrying out decisions.
8. Honor the student voice. Ensure strong, effective staff support to encourage student voice.
9. Respect those who express their views on issues related to the District. Solicit input and listen to all perspectives.
10. Actively participate in community events, acting as ambassadors on behalf of the District, as well as in state and/or national events when possible.
11. Strive to cultivate and maintain productive relationships, and work as a team with one another and the Superintendent.

I. Priority Setting and Evaluation

A. Priority Setting

1. The Board will establish, at a public meeting, annual and long-term priorities in alignment with the District's strategic plan and Superintendent's goals. The Board will align their work with District goals and the budget process, and will convene regular retreats to discuss and evaluate the District progress in meeting these priorities.
2. Every six months, the Board will elect two Co-Chairs during one of their public meetings.
3. Board Co-Chairs will meet regularly with the Superintendent and key staff to evaluate past Board meetings and determine the agenda for upcoming Board meetings.
4. In accordance with Board policy and procedure, agenda items for general discussion, presentation, reports, etc., will be established jointly by the Board Co-Chairs and the superintendent. Requests for placing such items on the agenda shall be submitted to the Board office.

The Board Co-Chairs will use the following criteria to consider items for placement on the Board meeting agendas:

- a. Strategic relevance and consistency with the priorities of the Board and the District;
 - b. Comparative importance;
 - c. Immediacy;
 - d. Community interest; and
 - e. Readiness for Board consideration (staff research, preparation, analysis, etc.)
5. Board members wishing to bring new resolutions not on the agenda, or to amend existing resolutions, are asked to provide their proposed resolution or amendment in writing to the Board office in advance of the upcoming Board meeting to allow sufficient time for consideration by Board members. A summary of description may be submitted in place of a resolution or amendment.

In accordance with parliamentary procedure, resolutions that are moved and seconded at a Board meeting will be considered, unless

called out of order by the chair; subsidiary motions to postpone, refer or object to a motion may also be moved and seconded.

In accordance with Board policy 1.70.011-P (9) (f), no action shall be taken at any Board meeting on items authorizing an expenditure of money, unless the recommendation for such expenditure appears in preliminary agenda for that meeting.

6. The Board Co-Chairs will regularly check in informally with Board members regarding the Board operations. In addition, the full Board will meet in a retreat mid-year to review operations and progress to date on the Board priorities.

B. Board Professional Development and Evaluation

1. The Board will self-assess its performance at least annually. The Board Co-Chairs will regularly evaluate Board meetings. All Board members are encouraged to provide feedback to the Co-Chairs at any time to improve the Board's performance. The Board will also set explicit priorities as a Board for Board professional development. The Board will annually review the Board Office budget to ensure there are sufficient funds to support the Board's professional development.

C. Superintendent's Evaluation

The Board will establish regular goals for the Superintendent's performance and engage in a process that provides for thoughtful and deliberative assessment of the Superintendent's work.

II. Meetings

- A. Board members agree to attend regularly scheduled Board meetings and work sessions unless a situation occurs that makes attendance impossible. Board members will cooperate in scheduling special meetings and/or work sessions for planning and training purposes, and will advise staff if a Board member is unable to attend or arriving late.
- B. Board members agree to start and end meetings on time.
- C. Board members will be prepared for each meeting by reviewing materials in advance.
- D. Board members agree to uphold the legal requirement for confidentiality on all matters arising from Board executive sessions and any other confidential communications.

- E. Board members agree to communicate with a focus on problem solving. Members will seek to clarify issues by soliciting each other's points of view.
- F. Board members agree to listen carefully and with courtesy when other people are speaking during Board meetings. Discussions between Board members will serve as a model for acceptable public dialogue.
- G. Board members shall cast a vote on all matters except when a conflict of interest arises.
- H. Board members agree that when it is necessary to miss a meeting, that they should review the video of that meeting or otherwise inform themselves of the content of the meeting.
- I. Board members agree that if they must be absent from a meeting, that they will only request to phone into the meeting to cast a vote. Boardroom equipment limits the quality of the transmission for participation in a discussion.

III. Communication

- A. Board members agree to communicate directly with the Superintendent and/or members of the Executive Committee if appropriate if a question arises, or when a concern is voiced by a staff member, student, parent, or other community member with the understanding that the matter will be addressed in a timely manner. To ensure optimal communication, Board members should copy the Superintendent and her Advisor, along with the General Counsel and Board Office Manager on their emails to the Executive Committee, and staff will do the same in its replies. By adhering to this communication loop, it verifies that Board members are receiving timely responses to their communication and that there are not multiple staff members working on the same issue. (These steps do not pertain to inevitable confidential situations that arise).
- B. Board members are requested to NOT directly contact staff who report to Executive Committee members without clearing it through the appropriate Executive Committee member first, as other staff may not be as familiar with Board communication and protocols. There may be case-by-case exceptions to this as determined by the Superintendent (such as key Communications Department staff). This provision is not intended to restrict Board member's ability to visit schools.
- C. Board members agree to communicate directly with the Board Co-Chairs or the Superintendent, as appropriate, when concerns arise about other Board members or District staff. When disagreeing with other Board members, Board members should maintain a respectful dialogue. Board members should refrain from personally criticizing another Board member or District staff in public.
- D. Board members retain the right to express individual opinions, and when doing so, will clearly state that the opinion is his/hers and not that of the Board.

- E. On occasion, it is beneficial to the Board and the public to have a designated Board spokesperson on a particular issue. In such cases, the Board Co-Chairs may speak for the Board on specific issues, or may designate other Board members to act as a spokesperson. Having a designated spokesperson does not mean that other Board members cannot express their opinions or perspectives about the issue.
- F. Individual personnel issues will be processed consistent with District policy and will not be discussed publicly, rather only with the Superintendent or designee. Specific personnel complaints submitted to the Board or individual Board members will be referred to the Superintendent or designee.
- G. From time to time, the Board may be required to make findings of fact that can be appealed to another government agency (i.e., personnel matters or charter school application hearings). In these situations, no Board member will discuss the substance of the matter with any person(s) directly involved in the issue, other than PPS staff, outside the formal hearing and deliberation process.

IV. Requests for Information

A. Information Requests of Staff

1. When Board members have information requests of staff (but do not require any particular decision to be made), the Board member should feel free to communicate their request to any member of the Executive Committee or through the Board Office Manager. The Superintendent or her Advisor should be copied on any written requests to keep her apprised of issues of concern to the Board.
2. If the request for information is of such a nature that it will take significant time to compile a response (i.e., more than two hours), the Board member should communicate his/her request to the Superintendent or designee for further direction. The Superintendent can then work with the Board member to determine the most efficient way to provide the information requested.

B. Requests Requiring Decision-Making or Resource Allocation

When a Board member has a request that will require a decision to be made or resources to be allocated, the Board member should send that request to the Superintendent or designee for a response in a timely manner.

C. Responding to Concerns from the Public about District Staff

When Board members are approached by members of the public expressing concerns about District staff and the person requests specific follow-up, the Board member should direct that person to address their concerns to the Superintendent. If a citizen voices a complaint about a particular employee at a public meeting, the Board Chair should direct that person to cease their comments and refer them to the Superintendent.

D. Providing Documents to Board for Review in Advance of Meetings

The Board Co-Chairs and Superintendent will establish the agenda for full Board meetings at least 10 days prior to the Board meeting. Staff and the Superintendent will have the Board book, and any supporting documentation, available at least three days prior to the Board meeting except under extenuating circumstances.

Board-Designated Areas of Focus	Executive Lead	Reporting to the Board
Continue to focus on successfully meeting all Milestone targets and further embed an even greater sense of urgency throughout the District to do so.	Amanda Whalen	Achievement Compact: October Work Session Graduation Rate: February Work Session
Ensure that all Bond projects continue to be implemented on time and on budget.	CJ Sylvester	Monthly Written OSM Reports Quarterly Presentations from BAC and OSM: November, February, May
Maximize the effectiveness of the Senior Director of Schools role and continue to provide the tools and supports they need in order to ensure our principals are successful and performing their highest and best.	Antonio Lopez	Principal Support and Evaluation: November Work Session School Climate Survey: March
Improve teacher/principal evaluation methodology and further enhance performance reinforcement systems.	Antonio Lopez	Teacher Evaluation: September Work Session Principal Evaluation: November Work Session
Develop and implement a strategy to welcome families as part of the District's Equity work.	Lorenzo Poe	Implementation of Racial Educational Equity Plan: August Presentation, December Work Session
Continue to improve financial reporting and business management processes with an emphasis on providing ready access to deeper analytics.	Chief Financial Officer	Budget Process and Budget Amendments: November-June Work Sessions
Develop and implement a vision and strategy for improving Career Technical Education, hands on and project based learning opportunities for students.	Antonio Lopez	CTE/Career Learning: October, February Work Sessions

Annual Actions Required	Other Work Identified
Budget (November-June)	Enrollment and Transfer Policy Revision (January, April, June)
Charter School Renewals (March)	Boundary Review (October, January, April, June)
Achievement Compact Approval (October)	Educational Specifications Update and K-8 Adoption (October)
Compliance Report/Division 22 (January)	School Calendar Update (December)
Non-Extensions/Non-Renewals (March)	Equity in Public Purchasing and Contracting (March)
Superintendent's Evaluation (May)	Affirmative Action Plan (December)
Open Enrollment (February)	Early Childhood Education (December)

Continue toward forging a collaborative working relationship with PAT.	Sean Murray	Teacher Evaluation: September Workload Committee: September, January, April, June
Continue to evolve the culture of the District with an ongoing emphasis on embedding a Continuous Improvement mindset.	Amanda Whalen	Regular Data In Packets School Improvement Plans: November Work Session
Complete the development of and then begin implementing a plan to examine the District's current assessment and testing practices.	Melissa Goff	November Work Session
Review and revise complaint policy and procedures to be more clear and family-friendly.	Jollee Patterson (policy development) Jon Isaacs (implementation)	September Work Session First and Second Reading: September, November ODE Audit Update: July
Accelerate the increase in our graduation and completion rates and work to narrow the achievement gap, with an emphasis on taking steps to ensure students graduate from PPS college and career ready.	Antonio Lopez	Multiple Pathways December Work Session Graduation Rates: February Work Session CTE/Career Learning: October, February HS Action Team Update: November HS Instructional Time and Graduation Rate Audit Update: February
Continue taking steps to ensure that 100% of students are reading at grade level by the end of third grade.	Melissa Goff	Achievement Compact October Work Session 3rd Grade Reading November Work Session
Reduce out-of-school discipline for all students and the disparity in out-of-school discipline between white students and students of color by 50 percent.	Lorenzo Poe	Discipline Data & Strategies: December, January and June Work Sessions

Comprehensive Annual Financial Report (December)	
MESD Local Service Plan (February)	
Head Start Adoption of Report (May)	
Legislative Priorities	
Climate Survey	
ESL Report	