

BOARD OF EDUCATION

Portland Public Schools
Work Session
May 7, 2012

Board Auditorium

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

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

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

This meeting may be taped and televised by the media.

WORK SESSION AGENDA

1. **RECOGNITION: LINCOLN HIGH SCHOOL CONSITUTION TEAM** 6:00 pm

2. **CITIZEN COMMENT** 6:20 pm

3. **CITIZEN BUDGET REVIEW COMMITTEE REPORT** 6:40 pm

4. **BUDGET DISCUSSION** 7:10 pm
 - Family Engagement
 - Equity Investments

5. **ADJOURN** 9:30 pm

The next Study Session of the Board will be held on **May 14, 2012**, at **5:00 pm** in the Board Auditorium at the Blanchard Education Service Center.

Portland Public Schools Nondiscrimination Statement

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

Board of Education Policy 1.80.020-P



PORTLAND PUBLIC SCHOOLS

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INFORMATIONAL REPORT TO THE BOARD

TITLE: EQUITY INITIATIVE BUDGET

Study Session Meeting Date: May 7, 2012

Executive Committee Leads: Lorenzo Poe, Carla Randall

Department: Office of Equity and Chief Academic Officer

District Priorities: Effective Educators
Equitable Access to Rigorous Common Core Program

I. BACKGROUND

On June 13, 2011 the Portland School Board unanimously approved the Portland Public Schools Racial Educational Equity Policy:

http://www.pps.k12.or.us/files/board/2_10_010_P_Equity_Policy.pdf. The policy calls out race-based disparities in schools, identifies the district's role in erasing them and holds up high expectations to ensure that all students reach their academic potential.

For the past 3 years, Portland Public Schools has consistently contracted with Pacific Educational Group (PEG) to lead professional development for staff around Courageous Conversations About Race (PPS contracted with PEG two previous years). These trainings and supports have provided us with a common framework and language to engage in the deep personal and systemic work that needs to occur in order to interrupt the institutional racism that exists in Portland Public Schools. In the past two years, our work with PEG has expanded to include direct work with schools around culturally relevant teaching strategies to engage their students of color. We believe that these strategies of engagement will lead to a closing of the racial opportunity gap that exists between students of color and their white peers.

This school year, the Student and Academic Supports Departments (Teaching and Learning, English as a Second Language, and Special Education) and the Regional Administrators participated in five seminars called Coaching for Racial Equity at our request. These sessions focused on developing capacity within the organization to lead the work with the principals and their school teams.

In addition to the school site-based work, this past year the Office of Equity was established and a Chief Equity Officer was appointed to provide strategic advice and support to the Superintendent and the Executive Cabinet on the organizational changes necessary to (1) build a culture of inclusion and acceptance and (2) build a workforce that is both diverse and culturally competent—with the ultimate goal of closing the achievement gap while raising achievement for all students. The key priorities of the department include:

- Leading implementation of the Racial Educational Equity Policy & monitoring District progress towards equity outcomes
- Coordinating & aligning District equity efforts
- Providing internal expertise in equity & inclusion in order to support our organization's capacity to do this work
- Managing design & implementation of tools and processes to support more equitable decision-making.
- Managing participation in national, regional and local equity initiatives
- Facilitating internal affinity groups

II. CURRENT WORK RELATED TO THIS ITEM:

In 2011-2012, PPS has focused on building the foundation for organizational and cultural change. We are developing our own capacity to lead this work with both the schools and the central office. The proposed budget expands the centralized supports to assist schools in their equity work including an additional two achievement coordinators who will be responsible for assisting CARE teams (see attached descriptions) in discovering and developing culturally responsive teaching and learning practices.

The proposed budget also includes seminars using the PEG Framework for Systemic Racial Equity Theory of Transformation to analyze the lived experience of emergent bilinguals of color in PPS, answering the question, "What does race have to do with the experience of these students in our system?" throughout the process. (Please see attached seminar description)

In addition to the school-based work, the Office of Equity facilitated the development and ongoing monitoring of an Annual Equity Plan and is in the process of facilitating development of a 5 year plan with clear measurable outcomes. Professional development sessions have begun with operational support departments (Finance, Human Resources, Operations, Community Involvement & Public Affairs, etc.) around both (a) how to lead *Courageous Conversations About Race* with department staff to increase the racial consciousness of the organization and (b) the use of a Racial Equity Lens tool to inform equitable decision-making. The Administrators of Color affinity group was established along with a governance structure that will help to inform executive leadership in key decisions that affect students and communities of color.

The 2012-2013 proposed budget for the Office of Equity continues to build on this foundational work. Equity plan development and monitoring will continue along with work on specific initiatives such as the development and implementation of an affirmative action policy. The Office will deepen professional development and support for operational support departments through the addition of an equity coach. Research shows that effective professional development which leads to changes in behavior is ongoing and job-embedded. This position will provide department-specific coaching and support. In addition, the office will take over responsibility

for equity leadership development—specifically Executive Cabinet training—which was managed by the Superintendent’s Office this past year.

IV. FISCAL IMPACT:

See attached proposed budget.

Equity Professional Development Budget

School-Based:

\$259,294

Equity professional development for schools is differentiated for three groups: Strand 1, Strand 2 and Beacon schools.

1) *Strand 1 Schools*

This strand is split into two cohorts totaling 67 schools that began their school and site equity leadership development this year. These equity teams (E-Teams) are the guiding coalition for equity at the school level. E-team seminars prepare school staff to lead, oversee and manage the processes of school-based transformational change. PPS E-Teams include the principal, teacher leaders, and often student support staff. Under next year's plan, Strand 1 schools would complete their e-team work with three Seminars.

2) *Strand 2 Schools*

This cohort of 20 schools will be in year two of their team equity work for 2012-13. This phase also includes Collaborative Action Research for Equity (CARE) Team development. These CARE teams are comprised of principals and classroom teachers that conduct classroom action research to discover, develop, document, deliver, and disseminate culturally relevant learning and teaching practices to meet the needs of the students and families in their schools. Following training, the CARE teams begin developing standards-based lessons that use research-based culturally relevant pedagogical strategies to engage their students of color. As part of the CARE team process, teachers interview students and parents of color to better develop culturally responsive lessons and to examine work in depth in order to determine the effect of instruction.

An overarching objective of the CARE initiative is to develop a corps of teachers who assist the principal and E-Team in discovering, implementing, and documenting instructional practices for improving the school experiences and performances of underserved students of color. Please see the attached "Adapted" Motivational Framework for Culturally Relevant Teaching that is utilized in our Beacon schools.

3) *Beacon Schools*

This cohort of 10 schools has been engaged in the work with Pacific Educational Group since 2009-10 school year. Receiving accelerated e-Team training with coaches from PEG. In the current year, Beacon schools developed Collaborative Action for Equity Teams (CARE Teams) and will participate in three seminars next year. These CARE teams have been developing lessons based on state and district standards using research-based culturally relevant pedagogical strategies to engage their students of color.

Organizational:

\$269,054

1) *Operational Support Leadership E-teams*

Pacific Educational Group will provide quarterly half-day seminars for operational support department E-teams. This past year was spent building capacity with operational support department leadership and their equity teams. Next year will focus on supporting E-teams as they begin engaging entire departments in *Courageous Conversations About Race*.

2) *Executive Cabinet Equity Professional Development*

Executive coaching sessions for the Superintendent and her leadership team in deepening the development of racial consciousness and building team skills to lead Equity work. Budget provides for six sessions for the Executive team plus individual follow up sessions.

3) *Affinity Group Support*

The Office of Equity will provide administrative assistance and technical support for district-approved affinity groups such as the Administrators of Color. These employee resource groups provide needed support for underrepresented employees with the goal of both increasing the diversity and inclusiveness of the District and providing executive leadership with unique perspectives on the equity work.

4) *Beyond Diversity*

PPS staff will offer six sessions of the two- day Beyond Diversity training to 60 employees per training.

5) *Emergent Bilinguals Training*

Please see attached document for Pacific Educational Group training descriptions.

6) *Courageous Conversations Summit 2012*

17 participants

7) *PEG Recertification*

5 teaching staff recertification

Equity Team Staff (Includes Salary and Benefits):

\$813,710

1) *Assistant Director (.5)*

Coordinates equity professional learning communities, assists principals in equity professional development.

2) *Achievement Coordinator (1.0)*

Coordinates trainings for district staff, manages logistics for PEG contractors

3) *Achievement Coordinators- Equity (4.0)*

Four teachers on special assignment who assist teachers and schools on integrating culturally responsive practices.

4) *Equity Coach* (1.0)

The Equity Coach is responsible for providing equity professional development and coaching for the District's operational support leadership (Human Resources, Finance, Operations, etc.). He or she will support each department's *Courageous Conversations About Race* E-teams (equity teams). The Equity Coach will further develop and lead the training on use of the district Equity Lens and move the use of the Equity Lens in operational decisions. As we invite our partners deeper into our work on equity and the use of the Equity Lens, the need to provide training to our critical partners will be required. The Equity Coach will create and deliver a model

5) *Senior Clerk II* (.75)

Additional Investments in Equity:

There are a number of other places in the organization where we make additional Investments in equity. Some of those primary investments include:

- 1) *Chief Equity Officer and personnel from the Office of Equity:* The Office of Equity is responsible for providing strategic advice and support to the Superintendent and the Executive Cabinet on the organizational changes necessary to (1) build a culture of inclusion and acceptance and (2) build a workforce that is both diverse and culturally competent—with the ultimate goal of closing the achievement gap while raising achievement for all students
- 2) *Workforce Recruitment and Hiring:* This team focuses on practices and procedures such as teacher and administrative hiring and evaluation to ensure that we hire and retain culturally responsive educators across the organization. As a result of the organization's commitment to equity, we have seen an increase in new hire diversity for teachers, administrators and non-represented staff.
- 3) *School-based investments:* Many of our schools use their professional development funds to expand their equity work beyond the training seminars.



AN "ADAPTED" MOTIVATIONAL FRAMEWORK FOR CULTURALLY RELEVANT TEACHING

A PRIMER FOR DESCRIBING PEDAGOGY

A. Establishing Inclusion: How does the learning experience contribute to developing as a community of learners who feel respected and connected to one another?

Routines and rituals are visible and understood by all.

- 1. Rituals are in place that help African American and Latino students feel that they belong in the class.
2. African American and Latino students and teacher(s) have opportunities to learn about each other.
3. African American and Latino students and teacher(s) have opportunities to learn about each other's unique backgrounds.
4. Classroom agreements and rules and consequences for violating agreements are negotiated.
5. The system of discipline is understood by all students and applied with fairness.
All students are equitably and actively participating and interacting.

- 6. Teacher directs attention equitably for African American and Latino students.
7. Teacher interacts respectfully with and according to African American and Latino students.
8. Teacher demonstrates that s/he cares about African American and Latino students.
9. African American and Latino students talk to and with partners in small group work.
10. African American and Latino students have opportunities to respond to the lessons by writing or speaking.
11. The lesson activities are made explicit for all students (African American and Latino students know what to do, especially when making choices).
12. African American and Latino students help each other.

B. Developing a Positive Attitude: How does the learning experience offer meaningful choices and promote personal relevance to contribute to a positive attitude?

Teacher works with African American and Latino students to personalize the relevance of course content.

- 1. African American and Latino students' experiences, concerns, and interests are used to develop course content.
2. African American and Latino students' experiences, concerns, and interests are addressed in response to questions.
3. African American and Latino students' prior knowledge and learning experiences are explicitly linked to course content.
4. Teacher encourages African American and Latino students to understand, develop, and express different points of view.
5. Teacher encourages African American and Latino students to clarify their interests and set goals.
6. Teacher maintains flexibility in pursuit of "teachable moments" and emerging interests.

Teacher encourages African American and Latino students to make real choices such as:

- 7. how to learn
8. what to learn
9. when a learning experience will be considered to be complete
10. how learning will be addressed
11. with whom to learn
12. how to solve emerging problems



AN "ADAPTED" MOTIVATIONAL FRAMEWORK FOR CULTURALLY RELEVANT TEACHING A PRIMER FOR DESCRIBING PEDAGOGY

C. Enhancing Meaning: *How does the learning experience engage participants in challenging learning?*

The teacher encourages all students to learn, apply, create, and communicate knowledge.

1. Teacher helps African American and Latino students to activate prior knowledge and to use it as a guide to learning
2. Teacher, in concert with African American and Latino students, creates opportunities for inquiry, investigation, and projects
3. Teacher provides opportunities for African American and Latino students to actively participate in challenging ways
4. Teacher asks higher order questions of African American and Latino students throughout a lesson
5. Teacher elicits high quality responses from African American and Latino students
6. Teacher uses multiple "safety nets" to ensure African American and Latino student success

D. Engendering Competence: *How does the learning experience create an understanding that participants are becoming more effective in learning they value and perceive as authentic to real world experiences?*

There is information, consequence, or product that supports African American and Latino students in valuing and identifying learning.

1. Teacher clearly communicates the purpose of the lesson
2. Teacher clearly communicates criteria for excellent final products
3. Teacher provides opportunities for a diversity of competencies to be demonstrated in a variety of ways
4. Teacher helps African American and Latino students to concretely identify accomplishments
6. Teacher uses multiple forms of assessment
7. Teacher assesses progress continually in order to provide feedback on individual growth and progress
8. Teacher creates opportunities for African American and Latino students to make explicit connections between new and prior learning
9. Teacher creates opportunities for African American and Latino students to make explicit connections between their learning and the "real world"
10. Teacher provides opportunities for African American and Latino students to self-assess learning in order to reflect on their growth as learners
11. Teacher provides opportunities for African American and Latino students to self-assess their personal responsibility for contributing to the classroom as a learning community

Providing Equitable Educational Experiences for Emergent Bilinguals in Portland Public Schools

As we look to the work for next year, the focus of the training seminars for Portland Public Schools will be a shift in conceptual orientation from "Limited English Proficient" or "English Language Learners" (both of which are rooted in a deficit model of thinking that places value and importance solely on dominance of English for our students who are native speakers of other languages) to one that views our multilingual students as "emergent bilinguals". This conceptual shift provides space for a conversation about the degree to which our educational systems, beliefs, and interactions with students and families are rooted in a belief that the multiple languages are indeed an asset to be developed and nurtured to their full capacity, not problems to be solved as students transition to English proficiency. Throughout this process participants will utilize the PEG Framework for Systemic Racial Equity Theory of Transformation to analyze the lived experience of emergent bilinguals of color in PPS, answering the question, "What does race have to do with the experience of these students in our system?" throughout the process. Below you will find a brief description of the proposed programming for next year.

Seminar 1: Who are Emergent Bilinguals in PPS; review of the research that surfaces classic inequities facing emergent bilinguals; connection to the PEG framework for systemic racial equity theory of transformation

As outlined below, in seminars 2 through 4 we will identify profiles of focal students of color (in alignment with our Culturally Relevant Pedagogy curriculum) who are emergent bilinguals at the elementary, middle school, and high school levels. Their educational experiences will be analyzed using "The Framework". In seminar 5 we will synthesize our reflections/insights throughout the process and put forth recommendations for programmatic review.

Seminar 2: Connection of Elementary Level Programming to the PEG Framework for Systemic Racial Equity Theory of Transformation

Seminar 3: Connection of Middle School Level Programming to the PEG Framework for Systemic Racial Equity Theory of Transformation

Seminar 4: Connection of High School Level Programming to the PEG Framework for Systemic Racial Equity Theory of Transformation

Seminar 5: Synthesis of Findings and Recommendations Moving Forward

Per our conversation, participating staff members would include the following individuals and any others who you feel would be instrumental to the success of the effort:

1. Chief Academic Officer
2. Pertinent staff from Equity team
3. Director of ESL Programming
4. Director of Dual Language Programming
5. Other pertinent RAs/administrators

6. Principal representation from the elementary, middle school, and high school levels (to the degree possible)

7. English Language Development Specialists/Instructional Coaches

Teacher perspective/voice would be interwoven throughout the process through a variety of methods and to the degree that sub budgets would allow could be included in the process as well.

**Citizen Budget Review Committee for Portland Public Schools
Budget Review of 2012-2013 Budget**

The Citizen Budget Review Committee (CBRC) for Portland Public Schools (PPS) is charged with the task of reviewing, and making recommendations on, the Superintendent's proposed budget. Our work is made easier with support from PPS staff, particularly Zhai Logan, David Wynde and other PPS employees who attend our meetings and/or provide information in response to our requests.

We believe our first order of business is to remind our fellow Portlanders that while 2012-13 revenues fall critically short, the funding crisis affecting our schools is not new. For decades we have witnessed a systematic disinvestment in Oregon's public schools. While it is very encouraging to see that PPS, the Portland Association of Teachers and the City of Portland may have found a way to avoid some of this year's devastating cuts, the issue of adequate K-12 funding remains and must be addressed.

Acknowledging these issues, the CBRC recommends the Board of Education approve the Superintendent's proposed budget.

CBRC comments reflect our understanding given the following inputs:

- Staff presentations on PPS programs;
- Testimony by parents, students, teachers, elected representatives and community members at Board hearings;
- Discussion within our group;
- Questions and comments posed by members of the Board; and
- Responses by the Superintendent during Board work sessions.

We reviewed the Superintendent's proposed budget in four general areas: successes, funding, process, and equity.

Successes

We wish to recognize the hard work and dedication of PPS and the greater community, with specific emphasis on achievement and performance:

- While there is still work to be done, we acknowledge that a positive trend is emerging in the achievement of all students.
- Since 2007 PPS has commissioned seven performance audits. 94% of audit recommendations have been implemented or are in the process of being implemented.

In short, we see PPS improving educational opportunities for students in the midst of declining resources through a combination of innovation, partnerships, wise consultation, and a dedicated workforce. We hope and trust District leadership and the Board will continue to invest in activities that maintain these trends.

Funding

State Funding

- Overall state revenues have increased, but the proportion allocated to K-12 education declined from 45% of the state budget in 2003-2005 to 39% in 2011-2013. If public education funding had remained at the 45% level, PPS would have received an additional \$70 million in the 2011-2013 biennium.¹
- Over the last 17 years (since Ballot Measures 5, 47 and 50 took effect), revenue reductions have decimated PPS's share of the state's K-12 funding. Revenue lost to PPS because of Measure 5 in the 2011-12 biennium alone amounted to \$25.88 million.²
- Since 2000, the Quality Education Model (QEM) establishes benchmarks for high quality K-12 education and the level of state funding required to support it. According to the QEM model, PPS should be receiving \$455.8 million in 2012-13, but its state allotment is only \$338.2 million, more than \$117 million less than the recommended funding level.³

We believe it is clear that Oregon's funding model is hopelessly broken and a new way to finance cradle to career education is imperative. The time has passed for discussion; genuine progress must begin today.

Local Funding

- Local Option Levy: Local Option Collections were forecast to provide PPS with \$62.3 million in funding for 2011-2012. Due to compression PPS collected only \$53.9 million; PPS estimates collections will likely continue to fall short of original projections for the next several years.
- Declining Property Tax Collections: Tough economic conditions and declining real property values within the PPS district have contributed to reduced property tax collections. Since housing prices are forecast to continue to decline for several more years, PPS can expect the declining property tax collection trend to continue.
- Impact of Urban Renewal Areas (URAs): PPS forgoes collection of approximately \$11 million annually as a result of City of Portland's URAs; approximately \$9.3 million of this is direct loss of tax revenue to PPS, and about \$2 million is PPS's share of state school funding.⁴ The City has benefited greatly from the URAs in terms of both economic development and upgrades to the City's infrastructure. The CBRC recommends that PPS continue to negotiate with the City for recovery of some of these foregone taxes to mitigate the financial impact of the URAs.

¹ Bobbie Regan, Board of Education work session, April 16, 2012.

² Tax Supervising and Conservation Commission (TSCC), Annual Report 2011-12, p. 25.
<http://tscmultco.com/publications.html>

³ Oregon Education Investment Board, Portland School District Achievement Compact 2012-13, p. 73.
http://www.oregon.gov/Gov/OEIB/OregonEducationInvestmentBoard.shtml - Achievement_Compacts

⁴ TSCC, Annual Report 2011-12, p. 57.

Federal Budget Cuts

In addition to the \$27.5 million cut in the general fund budget, this budget includes a \$2 million decrease in IDEA funding for Special Education and a \$6 million cut in 2012-2013 Title I funding.

Use of Reserves

We understand that in the face of such deep budget cuts, some are calling for PPS to draw down reserves below the 3.5% proposed by the Superintendent. While we support the Superintendent's proposal to reduce Reserves to 3.5%, we would not support a decision by the Board to further reduce the Reserves below that threshold. The strategy of using reserves to fill budget holes is not sustainable.

Process

- We believe the CBRC could be a more effective resource to the Board if CBRC members were appointed earlier in the year to allow adequate time to review the draft budget. More specifically, we believe the CBRC should be appointed in the fall of each year in order to have time to gain better perspective on the issues facing PPS.
- We applaud PPS for identifying and prioritizing essential services and high-level strategies throughout the 2012-2013 budget development process. We recommend the continued use of a Priority-Based Budgeting process over an across-the-board cut as we believe PPS' commitment to the strategic priority framework has contributed to the aforementioned increases in student achievement.
- For the past several years, the CBRC has recommended that PPS continue to improve efforts towards transparency in the budget document. We understand that budgetary constraints have halted some progress toward that end; for example, Departmental Budgets are no longer available. As revenue continues to fall, it is more critical than ever that the public has user-friendly access to information about the funding of their neighborhood schools. PPS should make a concerted effort to assist the public in understanding how budgetary changes have meaningful and measurable impacts on the learning environment.

Equity

- Students of color, immigrant and refugee students, and low-income students face significant disparities in PPS. We support the Board's adoption of the first PPS Racial Educational Equity Policy and the use of that policy to differentiate resources to meet PPS's goal of educational equity.
- The CBRC requests that PPS provide documentation on how resources are differentiated and how these differentiated resources advance the goals of the Equity Policy.
- The CBRC objects to the use of the budget to enforce difficult decisions rather than allowing meaningful community involvement to take place. Parents, teachers, staff and students at the Young Women's Leadership Academy (YWLA) and Humboldt were not

given adequate notice of imminent changes to their schools. There were only 21 days between the announcement of the proposal to close the YWLA program and consolidate Humboldt and Boise-Eliot, and the vote to seal the fate of these schools. This continues a pattern of disruption in underrepresented communities. We hope the Superintendent and her staff engage the communities in a more in depth series of conversations about the enrollment issues in the Jefferson cluster later this fall.

- PPS must be much more transparent with the community. We must determine the optimum size of all schools in order to ensure that equitable learning opportunities are available for every student. This means PPS must look very hard at all schools and clusters to optimize physical and human resources.
- Although some gains were reported in the milestones last year that reduced the achievement gap, we have a long way to go to actualize educational equity. We support the Superintendent's proposal to target resources to those students with the greatest need; to focus on partnerships within communities; and to hold the English as a Second Language Department harmless. Eliminating educational disparities faced by students of color and low-income students will improve educational outcomes for all.

Concluding Remarks

The CBRC reiterates its appreciation for all PPS employees, parents, and the students themselves whose efforts have resulted in real gains in student achievement. We are especially grateful for the consistent support for public education shown by Portlanders and encourage community members to continue their participation in public processes and partnerships at all levels to facilitate equitable outcomes for our children.

However, local efforts cannot fix the problem of chronic underfunding of public education in Oregon. As Superintendent Smith said in her budget message: this is not a PPS problem; it is a state problem and requires a state solution. For the last 20 years, because of a series of ballot measures and legislative actions that both reduced tax revenues and mandated budgetary priorities, Oregon has disinvested in public education. We are now at a crossroads. Tinkering with the current staggeringly complex tax system will not produce revenue sufficient to provide stable, adequate funding for education. If this state really wants to provide quality education for its children, we must reverse the trend and tackle comprehensive tax reform.

We call on elected officials at all levels – City, County, local school boards, state legislators, and the Governor – as well as community and business leaders to embrace their leadership role and engage the electorate in a genuine conversation about our state's priorities and how we want them reflected in the budget.

Ultimately, it is up to us, the voters of this state, to decide what kind of state we want to live in. The choices we made as voters brought us here. We can choose now to reverse course. We call on our fellow Oregonians to create a statewide coalition to demand comprehensive tax reform and stable, adequate funding for education.

The 2011-2012 PPS CBRC respectfully submits this report to the Board of Education.

Ed Sloop, co-chair	Construction estimator; PPS Graduate; PPS parent
Toya Fick, co-chair	Public servant
Dick Cherry	Irvington Elementary School teacher; former PPS parent
Adrienne Enríquez	Grant Program Manager
Tom Fuller	Project manager and school volunteer
Roger Kirchner	Retired state/federal public servant; PPS graduate; PPS parent
Scott McClain	
Julia Meier	Non-profit director
Rita Moore	PPS parent, consultant
Betsy Salter	PPS parent
Patrick Stupfel	Student Rep; Alliance High School
Kathleen Taylor	State auditor and PPS parent



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Zeke Smith
Chief of Staff
Office of the
Superintendent

May 5, 2012

MEMORANDUM

To: Board of Education
CC: Carole Smith, Superintendent
From: Zeke Smith, Chief of Staff

RE: Budget Work Session on May 7th

Introduction

This memo includes three specific sections:

- Information regarding the Tentative Agreement and impacts on the 2012-13 Budget.
- Changes in Revenue and Expenditure Projections from the Proposed Budget, which should be incorporated into the Budget for Approval on May 14.
- Additional informational items requested by board members in previous Work Sessions.

In addition to these items, there are attachments to this document in preparation for the May 7 Budget Work Session. These include:

- **Culturally Specific Family Engagement Contracts Update:** A Staff Report providing historical and current information on Culturally Specific Contracted Parent and Family Engagement Services. Lorenzo Poe and Dunya Minoo will also be available during the Work Session to discuss this item. This information is in response to Board requests and is intended to inform the broader Family Engagement discussion, including Board feedback on the elimination of the 4 Coordinator positions.
- **Citizen Budget Review Committee Report:** The report developed by the Citizen Budget Review Committee. This is also a discussion item for the May 7th Work session.

A series of other information items were included in the Board packet, which also relate directly to this budget memo. This includes:

- A staff report and recommendation to increase our school lunch fees next year in accordance with State and Federal guidelines. This does not require Board action outside of the Budget Approval and Adoption process.
- A staff report outlining the development of two new funds in order to deal with Facilities related issues. The development of these funds requires Board Action and will be taken up at the May 14th Board Meeting. If you have questions about these issues, we will take the time to discuss during the May 7th Work Session.

- A Letter and information from the Portlanders for Outdoor School which identifies a proposed plan The Portlanders for Outdoor School have put together that reduces the PPS overall cost for the 3 Day program from roughly \$490,000 to \$150,000 for the 2012-13 school year. The Superintendent is interested in identifying funding to support this one year proposal, as well as working together with this group to garner sustainable outside support for this program. We anticipate using \$150k in one-time funds available through the MESD to support this offer. This is not a sustainable investment and will require external support for future continuation of the Outdoor School program. Additionally, we would be proposing to increase the parent contribution from \$60 per student to \$90.

Tentative Agreement

The Tentative Agreement signed this last week, which still needs to be ratified by all three parties, has a significant impact on our budget. Given the timing of this agreement, changes will occur between the Approved Budget and the Adopted Budget. At the same time, we know Board members will want to discuss these impacts prior to approving the budget on May 14th.

If the Board agrees to ratify the tentative agreement, this will occur at the May 14th Board meeting prior to Approval of the 2012-13 Budget. Staff will include a clause in the resolution pertaining to the tentative agreement that directs staff to make relevant changes prior to Board Adoption of the 2012-13 Budget.

Specific aspects of this agreement worth noting at this time include:

- Restoration of school staffing to mitigate any potential direct impacts of due to budget reductions. The specific impact is outlined below, it is worth noting this will restore approximately 100 FTE to our school staffing. An additional 10 FTE is proposed to be used to restore Special Education services to students, while keeping our current Maintenance of Effort level of General Fund support for Special Education consistent with the 2011-12 level.
- Changes to salaries, as a result of teacher concessions and administrative furloughs, would be reflected in the Adopted Budget, and so are not currently included in the changes from Proposed to Draft Approved Budget outlined below.
- This agreement is predicated on a change in the amount of resource available for IT Refresh in our General Fund Budget from \$700k to \$350k. Details are included below.

Changes from Proposed Budget

Below please find the proposed changes to the Superintendent's proposed budget: Resources increased by \$295,000:

- Since the proposed budget, we have received the initial 2012-13 MESD forecast that shows transit dollars increasing by \$300,000 from the prior year. This is offset by elimination of \$5,000 for federal forest fees which we no longer receive..
- Requirements also increased by \$295,000: Major elements included increased costs for charter schools offset by lower long-term debt service.
 - Due to existing contractual obligations, the Charter Schools budget needs to be increased by \$504,103. The proposed budget incorrectly showed no change in costs from current year. Higher enrollment is forecast for charter schools because of LaMonde Charter opening and other schools adding grade levels per their contracts.

- Partially offsetting this increase is the elimination from the approved budget of \$292,516 of long-term debt service. The debt service schedules were a work in progress at the time of the proposed budget and there was one item that is no longer applicable.
- The other changes are a result of three factors: changing allocation between program codes as result of the school staffing set aside allocations; a number of corrections to the allocation of central staffing positions between and among programs; and adjustment to the fringe rate which impacts most programs but only by a small amount.

PPS General Fund	Current 2011/12	Forecast 2012/13	Proposed 2012/13	Draft Approved 2012/13	Change from Proposed
Beginning Balance	31,541,461	24,559,000	24,559,259	24,559,259	-
Revenues					
Revenue from Local Taxes	72,742,244	72,256,000	72,255,750	72,255,750	-
Local Option Property Taxes	53,947,244	52,819,000	52,819,550	52,819,550	-
Property Taxes - Perm. Rate Gap Tax	18,795,000	19,437,000	19,436,200	19,436,200	-
Tuition	350,000	155,000	155,000	155,000	-
Earnings on Investments	600,000	700,000	600,000	600,000	-
Extra-curricular Activities	670,000	784,000	664,800	664,800	-
Other Revenue from Local Sources	9,570,985	9,064,000	9,454,000	8,954,000	(500,000)
Intermediate Sources	6,915,000	6,700,000	6,900,000	7,200,000	300,000
State School Fund	340,261,270	339,626,000	339,571,700	339,571,700	-
Property Taxes	178,453,000	182,988,000	183,039,700	183,039,700	-
SSF - General Support	150,060,454	152,623,000	152,623,000	152,623,000	-
SSF - Other	11,747,816	4,015,000	3,909,000	3,909,000	-
Federal Sources	-	-	5,000	500,000	495,000
Other Sources	5,809,747	1,900,000	2,000,000	2,000,000	-
Total Revenue	436,919,246	431,185,000	431,606,250	431,901,250	295,000
Total Resources	468,460,707	455,744,000	456,165,509	456,460,509	295,000
	Current 2011/12	Forecast 2012/13	Proposed 2012/13	Draft Approved 2012/13	Change from Proposed
Total Expenditures	436,876,336	449,983,000	429,034,563	429,329,660	295,097
Transfers to Other Funds	7,311,572	7,989,000	9,025,736	9,025,639	(97)
Operating Contingency	24,632,817	25,288,000	18,105,210	18,105,210	-
Total Requirements	468,460,707	483,260,000	456,165,509	456,460,509	295,000
Net Budget Position	-	(27,516,000)	-	-	

Other Budget Updates and Information Requested by the Board

PPS staffing in HR and IT

District	Enrollment	IT (2012-13 proposed FTE)	HR (2012-13 proposed FTE)
<i>Portland</i>	<i>47,288</i>	<i>61.8</i>	<i>32.6</i>
Beaverton	39,414	44	17
Salem-Keizer	40,100	78.07	32.25
Seattle Public Schools	47,000+	48.2	41.2
San Francisco Unified	57,105	82.75	36.9

The preceding table compares PPS, Beaverton and Salem-Keizer school district's staffing for 2012-13 in IT and HR, based on information in each district's proposed budget. It also includes current year information from the Seattle and San Francisco School Districts, which are relatively comparable districts to PPS. The PPS number for IT reflects a reduction of 8 FTE from 69.8 in the current year and the HR number is a reduction of 7.3 FTE from 40.99 in the current year. This HR figure includes additional reductions which we had previously not identified.

These are superficial comparisons. It would take a more substantial review and discussion with these districts to make a real apples-to-apples comparison. Each school district organizes and staffs according to the circumstances it faces (e.g., enrollment, number and distribution of schools, support provided by regional Education Service Districts, labor contract requirements, program requirements, etc.).

There are other factors to consider:

- Functions may be structured in a discrete and easy to identify way, or they may be distributed across departments and schools, making them less easily compared (e.g., some IT staff may be school-based or they may be all accounted for in centralized department).
- For IT, General Fund budget comparisons may not reflect use of ESD resolution dollars, capital financing, grants, or other funds that don't show in a GF budget comparison. In addition, capital investments (or lack thereof) also affect staffing support. For example, does a district have new computers and up-to-date technology or old systems (and school buildings) that require more support? How much capital money has been spent in the last five years and how many systems are being updated or implemented (such as Smarter Balanced Assessments)?
- For PPS HR encompasses the following functions:
 - Hiring; staffing; assignment and transfer
 - Recruitment
 - Compensation (teacher professional growth tracking; CBA salary increases)
 - Benefits (Medical/Dental/vision/LOA/FMLA/LTD/FSA/HRA/403b etc.)
 - Performance Management (full cycle evaluation; includes Plans of assistance; discipline etc.)
 - Employee relations
 - Labor Relations and negotiations
 - Substitute Office
 - HRIS (includes all employee data entry; evaluation tracking; licensure renewal; data analysis; public records requests; position management; SMT; ODE data collection/EEOC/NCLB and HQ tracking)
 - HR Legal Counsel (employee litigation; non-extension/non-renewal; investigations)
- Other factors impacting HR staffing are that PPS has 6 different Collective Bargaining agreements (CBAs), and a custodial civil service board, that we must administer and operate within. Those CBAs all have different requirements for employees that includes: hiring; compensation; benefits; assignment & transfer, discipline, grievances etc. The civil service board covers custodians and is unique to PPS.
- PPS has double the number of schools that Beaverton has.

School Staffing Changes by Grade Level – After Impact of Tentative Agreement

School Level	Student Changes	Year to Year Changes in General Fund					Total General Fund FTE Change at School w/o Agreement	Actual Total General Fund Change at School
		Student Enrollment Related Changes	One-time non-formula allocations expire	Budget-Related Staffing Reductions from all schools	Non-formula allocations for 2012-13	Merger/Closures		
Elementary Total	337	12.3	-14.8	0	-1.0	-0.3	-61.9	-2.0
PK/K-5 Total	251	6.7	-3.6	0	-2.0	0	-27.7	-0.1
PK/K-8 Total	86	5.7	-11.2	0	1.0	.03	-34.2	-1.9
Middle School Total	142	7.5	-3.7	0	0	0	-12.0	2.8
High School Total	-325	-15.3	-16.3	9.9	2.0	-6.1	-45.6	-24.9
Alternative Total	7	0.1	-1.0	0.4	0.5	0	-2.5	-0.5
Grand Total	161	4.5	-35.8	10.1	1.5	-6.4	-122.0	-24.6

There are multiple factors which impact the actual staffing for each individual school for 2012-13.

1. Step One: Student enrollment changes are taken into consideration. Across our system, which is projected to continue to see enrollment growth, we anticipate this will add 4.5 FTE to our school staffing. However, high schools are still projected to see enrollment declining, due to smaller grades moving up, and will see a reduction of 15.3 FTE from their staffing levels this year.
2. Step Two: Last year we provided 35.8 FTE to support one-time, non-formula additions to schools in order to mitigate losses due to both enrollment fluctuation and budget reductions. In particular, this included 16.3 FTE for high schools accommodating the change to a 6 of 8 teaching schedule. This non-formula addition has acted as a cushion when we are reducing staff, particularly focusing on schools that cannot meet core program requirements. It is one way we have differentiated funding based on student needs.
3. Step Three: Allocate budget reductions. Given the impacts of the new tentative agreement, we are anticipating we will actually see a 10.1 FTE increase as a result of restoring the potential staffing reductions. If we did not have this agreement, we would have seen a reduction of 118.1 FTE in this column alone.
4. Step Four: We have a small number of non-formula additions this year to support schools in meeting Core Program Requirements at a total increase of 1.5 FTE. This is significantly smaller than what would have been necessary to mitigate the loss of staffing due to budget reductions.
5. Step Five: We adjust for mergers and closures. In this case, the Young Women's Academy is included in the High School total and the Humboldt reduction is in the PK/K-8 total.
6. Step Six: We see the Net Result in the far right column. Again, if we are not able to restore staffing as outlined in our Tentative Agreement with PAT and the City of Portland, we would see an overall staffing reduction of 122.1 FTE, versus our current expectation of a -24.6 FTE reduction, primarily due to reductions in high school enrollment and our current capacity to meet core program requirements (meaning we don't need the same size non-formula add back).

PPS Capital Spending

One question Board members had raised coming out of the previous work sessions was about the specific proposed capital expenditures included in the proposed budget. Below is a list:

- \$8.8 million Purchase of Rosa Parks School. Original funding structure matures in October, 2012 and lease period ends.
- \$6.9 million Boiler burner conversion project. Replacing oil-fired burners with natural gas units and related work in 40+ schools
- \$6.9 million Construction Excise Tax. Includes carry forward of funds collected to date and 2012-13 collections. Only use determined so far is to service capital debt, which means about \$200,000 in interest payments. Other uses likely to be clarified after bond timing and passage is clear. Some of these funds will be used for the Capital Asset Renewal Plan.
- \$4.5 million Remaining work on Recovery Zone bond financed projects. This includes Steam Valve replacements in 41 buildings; Exit Lighting District wide; Dual flush Fixtures in 83 buildings; Upgrading our Delta Energy Management System (EMS) at 54 buildings; For our kitchens we upgraded Food Warmers, Walk-in Coolers and Ovens at various sites; Field Irrigation improvements at Franklin, Madison, Wilson and Jefferson; Steam trap replacements at various schools; Various ESCO Performance measures District wide that include Mechanical Insulation, converting water cooled compressors to air cooled and auto flush urinals.
- \$3.0 million Grant HS field. Included in 2011-12 budget but actually not occurring earlier than 2012-13. Most of funds are being raised by outside parties (Grant HS Boosters).
- \$3.0 million Marysville School rebuild from insurance proceeds
- \$3.0 million Energy efficiency funds under Cool Schools. Some of these funds may be used to pay for a portion of the boiler burner work, subject to ODE approval of applications. Balance will be directed to energy-efficiency projects.
- \$2.8 million Office of School Modernization. Staffing for bond preparation. Any funds needed for Marysville not covered by insurance proceeds. Modular classrooms.
- \$1.5 million *Capital projects through PPS Facilities Debt. This is the only General Fund money on this list. This does not represent new General Fund money to support additional projects, but has previously been included in our \$3 million Facilities Maintenance budget.*

Computers

Board members asked for additional detail about the proposed IT budget, specifically the \$700K in "Refresh". **Please note, the Tentative Agreement for Restoring School Staffing is predicated partially on taking \$350K from this line item out of the General Fund.** It will either be funded through the IT Capital Budget or reduced by this amount.

Background:

- "IT Refresh" has historically been part of the IT General Fund. Dollars are meant to provide schools a way of maintaining current, and purchasing new, IT equipment for teachers and students. Refresh has also been used to maintain IT Infrastructure (equipment behind the wall and in the data center).
- Prior to budget cuts, at its height, IT Refresh was \$1.5m/year. \$1m was distributed to schools. \$500k was used for IT Infrastructure.
- In 2011-12 FY, IT maintained a \$1.3 million budget. \$1m was allocated to schools by ADM/site. \$100k was used for the Microsoft Enterprise License. \$200k was withheld for IT Infrastructure investment.
- In 2012-13 FY, the IT budget as proposed includes \$700k in IT Refresh and will allocate \$450k to schools. \$100k will be used for Microsoft Enterprise licensing. \$150k will be withheld for IT Infrastructure investments. If we decrease the school based amount by another \$350k, this would leave \$100k for schools to maintain current technology and severely limit any new investments or upgrades.

Need for Refresh:

- Student computing requirements for both instructional and assessment purposes are increasing. IT Refresh plays critical role in ensuring that each PPS schools have a technology-specific allocation each year to meet those needs. We are looking at whether we can increase student technology investments in order to meet assessment requirements of the new Common Core State Standards as a part of our IT Capital Investment Strategy. This will be brought for Board approval at a later date.
- Additionally, schools need a funding source to keep current equipment operating – lamps for projectors, RAM upgrades for computers and occasional purchase of new technology reflect typical use of IT Refresh for schools.
- PPS does not have a standard technology refresh process for any equipment including infrastructure. As a result, a portion of IT Refresh must be reserved to replace equipment when it fails or when it is about to fail.
- The district MS Enterprise Licensing agreement is a highly cost efficient way to ensure all users have access to MS Operating Systems and applications. It allows us to apply software to purchased and donated equipment district-wide without the need for individual "bundle" licenses.



PORTLAND PUBLIC SCHOOLS

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INFORMATIONAL REPORT TO THE BOARD

TITLE: EQUITY INITIATIVE BUDGET

Study Session Meeting Date: May 7, 2012

Executive Committee Leads: Lorenzo Poe, Carla Randall

Department: Office of Equity and Chief Academic Officer

District Priorities: Effective Educators
Equitable Access to Rigorous Common Core Program

I. BACKGROUND

On June 13, 2011 the Portland School Board unanimously approved the Portland Public Schools Racial Educational Equity Policy:

http://www.pps.k12.or.us/files/board/2_10_010_P_Equity_Policy.pdf. The policy calls out race-based disparities in schools, identifies the district's role in erasing them and holds up high expectations to ensure that all students reach their academic potential.

For the past 3 years, Portland Public Schools has consistently contracted with Pacific Educational Group (PEG) to lead professional development for staff around Courageous Conversations About Race (PPS contracted with PEG two previous years). These trainings and supports have provided us with a common framework and language to engage in the deep personal and systemic work that needs to occur in order to interrupt the institutional racism that exists in Portland Public Schools. In the past two years, our work with PEG has expanded to include direct work with schools around culturally relevant teaching strategies to engage their students of color. We believe that these strategies of engagement will lead to a closing of the racial opportunity gap that exists between students of color and their white peers.

This school year, the Student and Academic Supports Departments (Teaching and Learning, English as a Second Language, and Special Education) and the Regional Administrators participated in five seminars called Coaching for Racial Equity at our request. These sessions focused on developing capacity within the organization to lead the work with the principals and their school teams.

In addition to the school site-based work, this past year the Office of Equity was established and a Chief Equity Officer was appointed to provide strategic advice and support to the Superintendent and the Executive Cabinet on the organizational changes necessary to (1) build a culture of inclusion and acceptance and (2) build a workforce that is both diverse and culturally competent—with the ultimate goal of closing the achievement gap while raising achievement for all students. The key priorities of the department include:

- Leading implementation of the Racial Educational Equity Policy & monitoring District progress towards equity outcomes
- Coordinating & aligning District equity efforts
- Providing internal expertise in equity & inclusion in order to support our organization's capacity to do this work
- Managing design & implementation of tools and processes to support more equitable decision-making.
- Managing participation in national, regional and local equity initiatives
- Facilitating internal affinity groups

II. CURRENT WORK RELATED TO THIS ITEM:

In 2011-2012, PPS has focused on building the foundation for organizational and cultural change. We are developing our own capacity to lead this work with both the schools and the central office. The proposed budget expands the centralized supports to assist schools in their equity work including an additional two achievement coordinators who will be responsible for assisting CARE teams (see attached descriptions) in discovering and developing culturally responsive teaching and learning practices.

The proposed budget also includes seminars using the PEG Framework for Systemic Racial Equity Theory of Transformation to analyze the lived experience of emergent bilinguals of color in PPS, answering the question, "What does race have to do with the experience of these students in our system?" throughout the process. (Please see attached seminar description)

In addition to the school-based work, the Office of Equity facilitated the development and ongoing monitoring of an Annual Equity Plan and is in the process of facilitating development of a 5 year plan with clear measurable outcomes. Professional development sessions have begun with operational support departments (Finance, Human Resources, Operations, Community Involvement & Public Affairs, etc.) around both (a) how to lead *Courageous Conversations About Race* with department staff to increase the racial consciousness of the organization and (b) the use of a Racial Equity Lens tool to inform equitable decision-making. The Administrators of Color affinity group was established along with a governance structure that will help to inform executive leadership in key decisions that affect students and communities of color.

The 2012-2013 proposed budget for the Office of Equity continues to build on this foundational work. Equity plan development and monitoring will continue along with work on specific initiatives such as the development and implementation of an affirmative action policy. The Office will deepen professional development and support for operational support departments through the addition of an equity coach. Research shows that effective professional development which leads to changes in behavior is ongoing and job-embedded. This position will provide department-specific coaching and support. In addition, the office will take over responsibility

for equity leadership development—specifically Executive Cabinet training—which was managed by the Superintendent’s Office this past year.

IV. FISCAL IMPACT:

See attached proposed budget.

Equity Professional Development Budget

School-Based:

\$259,294

Equity professional development for schools is differentiated for three groups: Strand 1, Strand 2 and Beacon schools.

1) *Strand 1 Schools*

This strand is split into two cohorts totaling 67 schools that began their school and site equity leadership development this year. These equity teams (E-Teams) are the guiding coalition for equity at the school level. E-team seminars prepare school staff to lead, oversee and manage the processes of school-based transformational change. PPS E-Teams include the principal, teacher leaders, and often student support staff. Under next year's plan, Strand 1 schools would complete their e-team work with three Seminars.

2) *Strand 2 Schools*

This cohort of 20 schools will be in year two of their team equity work for 2012-13. This phase also includes Collaborative Action Research for Equity (CARE) Team development. These CARE teams are comprised of principals and classroom teachers that conduct classroom action research to discover, develop, document, deliver, and disseminate culturally relevant learning and teaching practices to meet the needs of the students and families in their schools. Following training, the CARE teams begin developing standards-based lessons that use research-based culturally relevant pedagogical strategies to engage their students of color. As part of the CARE team process, teachers interview students and parents of color to better develop culturally responsive lessons and to examine work in depth in order to determine the effect of instruction.

An overarching objective of the CARE initiative is to develop a corps of teachers who assist the principal and E-Team in discovering, implementing, and documenting instructional practices for improving the school experiences and performances of underserved students of color. Please see the attached "Adapted" Motivational Framework for Culturally Relevant Teaching that is utilized in our Beacon schools.

3) *Beacon Schools*

This cohort of 10 schools has been engaged in the work with Pacific Educational Group since 2009-10 school year. Receiving accelerated e-Team training with coaches from PEG. In the current year, Beacon schools developed Collaborative Action for Equity Teams (CARE Teams) and will participate in three seminars next year. These CARE teams have been developing lessons based on state and district standards using research-based culturally relevant pedagogical strategies to engage their students of color.

Organizational:

\$269,054

1) *Operational Support Leadership E-teams*

Pacific Educational Group will provide quarterly half-day seminars for operational support department E-teams. This past year was spent building capacity with operational support department leadership and their equity teams. Next year will focus on supporting E-teams as they begin engaging entire departments in *Courageous Conversations About Race*.

2) *Executive Cabinet Equity Professional Development*

Executive coaching sessions for the Superintendent and her leadership team in deepening the development of racial consciousness and building team skills to lead Equity work. Budget provides for six sessions for the Executive team plus individual follow up sessions.

3) *Affinity Group Support*

The Office of Equity will provide administrative assistance and technical support for district-approved affinity groups such as the Administrators of Color. These employee resource groups provide needed support for underrepresented employees with the goal of both increasing the diversity and inclusiveness of the District and providing executive leadership with unique perspectives on the equity work.

4) *Beyond Diversity*

PPS staff will offer six sessions of the two- day Beyond Diversity training to 60 employees per training.

5) *Emergent Bilinguals Training*

Please see attached document for Pacific Educational Group training descriptions.

6) *Courageous Conversations Summit 2012*

17 participants

7) *PEG Recertification*

5 teaching staff recertification

Equity Team Staff (Includes Salary and Benefits):

\$813,710

1) *Assistant Director (.5)*

Coordinates equity professional learning communities, assists principals in equity professional development.

2) *Achievement Coordinator (1.0)*

Coordinates trainings for district staff, manages logistics for PEG contractors

3) *Achievement Coordinators- Equity (4.0)*

Four teachers on special assignment who assist teachers and schools on integrating culturally responsive practices.

4) *Equity Coach (1.0)*

The Equity Coach is responsible for providing equity professional development and coaching for the District's operational support leadership (Human Resources, Finance, Operations, etc.). He or she will support each department's *Courageous Conversations About Race* E-teams (equity teams). The Equity Coach will further develop and lead the training on use of the district Equity Lens and move the use of the Equity Lens in operational decisions. As we invite our partners deeper into our work on equity and the use of the Equity Lens, the need to provide training to our critical partners will be required. The Equity Coach will create and deliver a model

5) *Senior Clerk II (.75)*

Additional Investments in Equity:

There are a number of other places in the organization where we make additional Investments in equity. Some of those primary investments include:

- 1) *Chief Equity Officer and personnel from the Office of Equity:* The Office of Equity is responsible for providing strategic advice and support to the Superintendent and the Executive Cabinet on the organizational changes necessary to (1) build a culture of inclusion and acceptance and (2) build a workforce that is both diverse and culturally competent—with the ultimate goal of closing the achievement gap while raising achievement for all students
- 2) *Workforce Recruitment and Hiring:* This team focuses on practices and procedures such as teacher and administrative hiring and evaluation to ensure that we hire and retain culturally responsive educators across the organization. As a result of the organization's commitment to equity, we have seen an increase in new hire diversity for teachers, administrators and non-represented staff.
- 3) *School-based investments:* Many of our schools use their professional development funds to expand their equity work beyond the training seminars.



AN "ADAPTED" MOTIVATIONAL FRAMEWORK FOR CULTURALLY RELEVANT TEACHING

A PRIMER FOR DESCRIBING PEDAGOGY

A. Establishing Inclusion: How does the learning experience contribute to developing as a community of learners who feel respected and connected to one another?

- Routines and rituals are visible and understood by all.
1. Rituals are in place that help African American and Latino students feel that they belong in the class.
2. African American and Latino students and teacher(s) have opportunities to learn about each other.
3. African American and Latino students and teacher(s) have opportunities to learn about each other's unique backgrounds.
4. Classroom agreements and rules and consequences for violating agreements are negotiated.
5. The system of discipline is understood by all students and applied with fairness.
All students are equitably and actively participating and interacting.

- 6. Teacher directs attention equitably for African American and Latino students.
7. Teacher interacts respectfully with and according to African American and Latino students.
8. Teacher demonstrates that s/he cares about African American and Latino students.
9. African American and Latino students talk to and with partners in small group work.
10. African American and Latino students have opportunities to respond to the lessons by writing or speaking.
11. The lesson activities are made explicit for all students (African American and Latino students know what to do, especially when making choices).
12. African American and Latino students help each other.

B. Developing a Positive Attitude: How does the learning experience offer meaningful choices and promote personal relevance to contribute to a positive attitude?

- Teacher works with African American and Latino students to personalize the relevance of course content.
1. African American and Latino students' experiences, concerns, and interests are used to develop course content.
2. African American and Latino students' experiences, concerns, and interests are addressed in response to questions.
3. African American and Latino students' prior knowledge and learning experiences are explicitly linked to course content.
4. Teacher encourages African American and Latino students to understand, develop, and express different points of view.
5. Teacher encourages African American and Latino students to clarify their interests and set goals.
6. Teacher maintains flexibility in pursuit of "teachable moments" and emerging interests.

- Teacher encourages African American and Latino students to make real choices such as:
7. how to learn
8. what to learn
9. when a learning experience will be considered to be complete
10. how learning will be addressed
11. with whom to learn
12. how to solve emerging problems



AN "ADAPTED" MOTIVATIONAL FRAMEWORK FOR CULTURALLY RELEVANT TEACHING A PRIMER FOR DESCRIBING PEDAGOGY

C. Enhancing Meaning: *How does the learning experience engage participants in challenging learning?*

The teacher encourages all students to learn, apply, create, and communicate knowledge.

1. Teacher helps African American and Latino students to activate prior knowledge and to use it as a guide to learning
2. Teacher, in concert with African American and Latino students, creates opportunities for inquiry, investigation, and projects
3. Teacher provides opportunities for African American and Latino students to actively participate in challenging ways
4. Teacher asks higher order questions of African American and Latino students throughout a lesson
5. Teacher elicits high quality responses from African American and Latino students
6. Teacher uses multiple "safety nets" to ensure African American and Latino student success

D. Engendering Competence: *How does the learning experience create an understanding that participants are becoming more effective in learning they value and perceive as authentic to real world experiences?*

There is information, consequence, or product that supports African American and Latino students in valuing and identifying learning.

1. Teacher clearly communicates the purpose of the lesson
2. Teacher clearly communicates criteria for excellent final products
3. Teacher provides opportunities for a diversity of competencies to be demonstrated in a variety of ways
4. Teacher helps African American and Latino students to concretely identify accomplishments
6. Teacher uses multiple forms of assessment
7. Teacher assesses progress continually in order to provide feedback on individual growth and progress
8. Teacher creates opportunities for African American and Latino students to make explicit connections between new and prior learning
9. Teacher creates opportunities for African American and Latino students to make explicit connections between their learning and the "real world"
10. Teacher provides opportunities for African American and Latino students to self-assess learning in order to reflect on their growth as learners
11. Teacher provides opportunities for African American and Latino students to self-assess their personal responsibility for contributing to the classroom as a learning community

Providing Equitable Educational Experiences for Emergent Bilinguals in Portland Public Schools

As we look to the work for next year, the focus of the training seminars for Portland Public Schools will be a shift in conceptual orientation from "Limited English Proficient" or "English Language Learners" (both of which are rooted in a deficit model of thinking that places value and importance solely on dominance of English for our students who are native speakers of other languages) to one that views our multilingual students as "emergent bilinguals". This conceptual shift provides space for a conversation about the degree to which our educational systems, beliefs, and interactions with students and families are rooted in a belief that the multiple languages are indeed an asset to be developed and nurtured to their full capacity, not problems to be solved as students transition to English proficiency. Throughout this process participants will utilize the PEG Framework for Systemic Racial Equity Theory of Transformation to analyze the lived experience of emergent bilinguals of color in PPS, answering the question, "What does race have to do with the experience of these students in our system?" throughout the process. Below you will find a brief description of the proposed programming for next year.

Seminar 1: Who are Emergent Bilinguals in PPS; review of the research that surfaces classic inequities facing emergent bilinguals; connection to the PEG framework for systemic racial equity theory of transformation

As outlined below, in seminars 2 through 4 we will identify profiles of focal students of color (in alignment with our Culturally Relevant Pedagogy curriculum) who are emergent bilinguals at the elementary, middle school, and high school levels. Their educational experiences will be analyzed using "The Framework". In seminar 5 we will synthesize our reflections/insights throughout the process and put forth recommendations for programmatic review.

Seminar 2: Connection of Elementary Level Programming to the PEG Framework for Systemic Racial Equity Theory of Transformation

Seminar 3: Connection of Middle School Level Programming to the PEG Framework for Systemic Racial Equity Theory of Transformation

Seminar 4: Connection of High School Level Programming to the PEG Framework for Systemic Racial Equity Theory of Transformation

Seminar 5: Synthesis of Findings and Recommendations Moving Forward

Per our conversation, participating staff members would include the following individuals and any others who you feel would be instrumental to the success of the effort:

1. Chief Academic Officer
2. Pertinent staff from Equity team
3. Director of ESL Programming
4. Director of Dual Language Programming
5. Other pertinent RAs/administrators

6. Principal representation from the elementary, middle school, and high school levels (to the degree possible)

7. English Language Development Specialists/Instructional Coaches

Teacher perspective/voice would be interwoven throughout the process through a variety of methods and to the degree that sub budgets would allow could be included in the process as well.



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

May 4, 2012

MEMORANDUM

To: Board of Education

CC: Carole Smith, Superintendent

From: Lorenzo Poe, Chief Equity Officer & Director of Partnership Development

RE: Culturally Specific Family Engagement Contracts Update

This memo and the corresponding attachments (A & B) are intended to provide a brief overview of the family engagement contracts to date.

It is important to note:

- 1) Based on how PPS has engaged with families in the past, we have underserved several communities (Native, African American, Latino, and all other ELL populations).
- 2) Contracting out these services to organizations that are connected to and trusted by their specific community allows PPS to begin to build relationships with these communities.
- 3) This type of business model allows us to leverage the expertise and added resources of our partners, reach more families, and build trust on a larger scale than internal efforts alone.

Portland Public Schools initial effort toward partnering with outside organizations to provide culturally specific community engagement began in 2009. From April 6, 2010 to September 15, 2011, Title I ARRA funds in the amount of \$1,528,000 were used to contract out with seven (7) community based agencies to offer an array of family engagement activities ranging from programs focused on supporting early learners and their families to engaging youth and families through individual student advocacy efforts.

In general, all of the organizations met their contractual outcomes/outputs, but due to the experimental nature of this initial effort, the loss of ARRA funding, and the

realignment of internal family engagement staff modifications to the model were needed.

For the 11-12 school year, the District provided \$550,000 in general funds to begin to develop a culturally specific family engagement model with input from CIPA/Family Engagement based on best practice research.

The Office of Equity and Partnerships then led a procurement process to contract with community organizations to strengthen the relationship between PPS and culturally specific communities using two of Epstein's Six Types of Involvement (J. Epstein, 2009; *School, Family, and Community Partnerships: Your Handbook for Action*. Pgs. 154, 156). Four contracts serving Tier I and Tier II schools focusing on supporting African-American, Hispanic, Native American and non-Hispanic ELL populations have been awarded and expire on June 30th 2012.

Specific details regarding each procurement process and the subsequent awards are included in Attachment A.

Family Engagement Contract Overview

2009 – 2011

Title I – ARRA Funded Community Engagement Partner Contracts - \$1,528,000

Title I issued an RFP for Community Engagement in the fall of 2009. The RFP called for proposals that would:

1. Engage families that are traditionally underserved or excluded by the values, norms and expectations of the American public education system.
2. Demonstrate an understanding of and model culturally proficient behaviors and norms for the community (ies) within which services are proposed.
3. Have clearly identified and replicable strategies for engaging community leaders and members with schools or the District that are based in research or longitudinal data of effectiveness.
4. Build plans for systems or relationships between the community (ies), service providers and the District that would extend beyond the life of the available funding.
5. Have clear procedures and measures for internal and external accountability.

The term of the **seven (7) contracts** was for **18 months – April 6, 2010 – September 15, 2011.**

Summary of Services

Contractor/ Program Name	Schools Served	Contract Total
Catholic Charities/Academia de Padres (Parents' Academy)	Lent, Kelly, Lane, Woodmere, Whitman, Rigler, Peninsula, King, George, Chavez, Humboldt, Madison	\$200,000
	<p>*Summary* Parents gained tangible skills to further their involvement in their child's school and education by learning about things like home-school collaboration, communication and discipline, and academic standards through a 9 week curriculum.</p> <p>*Outcomes* 234 parents enrolled in the Academia, 162 graduated. 600 parents volunteered 6664 hours, visited classrooms 308 times, 350 parents attended family nights, 300 participated in school groups or committees</p>	
NE Coalition of Neighborhoods/ Engage Me	Humboldt and Jefferson YWA	\$240,000
	<p>*Summary* Engage Me offered a multi-faceted parent and student engagement model that included weekly coffee chats, culturally specific parent training workshops, special family events, life-skill training, listening sessions, and an Engage Me TV show and website.</p> <p>*Outcomes* Total parent chat contacts 549, new Humboldt PTA recruits, Tubman created a comprehensive parent contact list that has 119 of 175 families signed up, Friday Parent room chats averaged 5 per week for a total of 75 parents, Humboldt average parent chat attendance 14, and average Humboldt parent volunteers 40.</p>	

Family Engagement Contract Overview

IRCO/Family and Community Engagement Services (FACES)	King, Lent, Marysville, Rigler, Rosa Parks, Whitman	\$238,000
<p>*Summary* FACES provided culturally adaptive parent engagement. Activities included parent workshops, parent groups, in home tutoring and individualized support to help families understand the US education system and help their children achieve academically.</p> <p>*Outcomes* Served 156 families with individualized family support, 250 families participated in parent education and support groups, please note, 100 more than target, 39 parent workshops were offered (the target was 18) 2154 hours in home tutoring for students and their parents was provided.</p>		
Latino Network/Juntos Aprendemos (Together We Learn)	Cesar Chavez, Rigler and Scott	\$234,000
<p>*Summary* Juntos Aprendemos is a program focused on early literacy, kindergarten-readiness skills and enabling Spanish-speaking children to enter kindergarten prepared to learn by equipping the children’s mothers and fathers with knowledge, confidence, and skills they need to support their children’s academic development.</p> <p>*Outcomes* Engaged 148 students, goal 127 served 187 parents, 15 volunteers, provided 23 outreach meetings.</p>		
NAYA/Youth Services Programming	Astor, Atkinson, Beach, Bridger, Creston, Faubion, Glencoe, Harvey Scott, Humboldt, Irvington, James John, Jason Lee, King, Laurelhurst, Prescott, Rigler, Roseway Heights, Sabin, Scott, Woodlawn, Woodmere.	\$200,000
<p>*Summary* This was an expansion of Youth Services Programming that promoted and cultivated parent involvement and student academic achievement through skill-building, resource linkage, advocacy, and individual service plans.</p> <p>*Outcomes* Contract goal of 60 students, served 76, 42 families attended one or more family nights at the NAYA family center, 13 families attended NAYA cultural night. 59 students involved in advocacy program (case management) students served at 25 schools.</p>		
Neighborhood House/Neighborhood House Parenting Program (NHPP)	Sitton, Cesar Chavez, and Rosa Parks	\$200,000
<p>*Summary* Families enrolled in NHPP received weekly parent-child groups and parent education, workshops for parents, parent support groups, family advocacy, translation, and transition to Kindergarten support.</p> <p>*Outcomes* Contract goal was 60 families, served 74. 46 African, 26 Latino and 2 Ukrainian or Russian, provided 67 ESL classes, 100 interactive parent-child groups.</p>		
Volunteers of America/Jovenes Adelante (Youth Going Forward)	Kelly and Scott	\$216,000
<p>*Summary* The program provided family-based services that were designed to respect the cultural and familial values of Latino families.</p> <p>*Outcomes* Hosted multiple culturally specific social engagements. Parents report increased engagement at school and improved communication with school staff. Successfully held parent group leadership elections.</p>		

Family Engagement Contract Overview

2011-2012

General Fund – Culturally Specific Family Engagement - \$550,000

Four (4) contracts to four local non-profit agencies: Self Enhancement Inc. (partnering with Black Parent Initiative), Latino Network, NAYA (Native American Youth and Family Center), and IRCO have been awarded.

This Culturally Specific Family Engagement model focuses on four specific cultural groups: African American, Latino, Native American and All Other ELL at Tier I and Tier II Academic Priority Zone Schools.

These programs are individually designed with their specific communities in mind to effectively engage families based on two of Joyce Epstein’s Family Engagement methods:

1. Communication between home and school: providing families with a variety of ways of interacting with schools to ensure that parents have greater information and capacity to support their students.
2. Support learning at home: foster greater capacity among families to support student learning outside of school, through skill development, making decisions about course of study, etc.

In addition, we have asked these contractors to gather baseline data about how families perceive their school in order to be able to inform subsequent family engagement efforts– School Climate Survey (Attachment B).

Summary of Services

Contractor/Program Name	Schools Served	Contract Total
IRCO/Family and Community Engagement Services (FACES)	Lent, Marysville, George, Vestal, Cesar Chavez, Bridger, Whitman, Woodmere, Rigler, Scott, Kelly, Rosa Parks George	\$127,935.80
	<p>*Summary* The FACES Family Engagement program is a continuation of the previous year’s contracted services which provide individualized support and group learning to Limited English Proficient (LEP) families. FACES group activities provide culturally and linguistically appropriate education opportunities on topics such as parents as teachers, life at school, and how to read a report card. Individualized support includes regular home visits and phone calls, individual parent meetings, referrals to resources such as SUN schools and Title X, and in-home tutoring.</p> <p>*Projected Outcomes* This program is expected to engage 135 parents or adult family members in group learning activities and provide 90 families with individualized support. In addition to this, FACES will provide personalized in-home tutoring for 25 students and 25 of their adult counterparts. These engagement efforts will result in 85-95% of these parents having: an improved understanding of school programs and policies, improved interactions and communications with school and teachers, better understanding of curriculum and how to help their students learn at home as well as more discussions with their student about school. Parents will show more support for their child’s progress and be better able to assist with school work and students will improve homework completion.</p>	

Family Engagement Contract Overview

Latino Network/ Colegio de Padres	Jefferson, Cesar Chavez, George, Lane, Lent, Peninsula, Roosevelt	\$131,805.20
<p>*Summary*</p> <p>The Colegio de Padres will include a series of weekly workshops, or <i>Charlas</i>, on important issues facing Latino families with children in 6-12 grades such as: communication with school about report cards and attendance as well as how to set up a home study environment. This program also includes a Plaza Comunitaria with access to a mobile computer lab where parents can use the Internet and email to promote communication with their children’s school. There will also be youth engagement and empowerment activities such as soccer, dance and cultural education that promote family involvement.</p> <p>*Projected Outcomes*</p> <p>This program is expected to engage 50 families in the Colegio de Padres (topics mentioned above) and provide access to the Plaza Comunitaria twice per week. There will be two community hubs in place, one for N/NE Portland and far SE where the mobile computer lab will be located. It is expected that 75% of families will participate in multiple opportunities with the program and will report increased communication with school and improved learning at home.</p>		
NAYA/Youth Services Programming	George, Peninsula, Kelly, Ockley Green, Rigler, Rosa Parks, Scott, Sitton, Vestal, Woodlawn, Woodmere	\$137,500
<p>*Summary*</p> <p>NAYA is a youth centered family engagement program. NAYA’s Youth Services programming is a continuation of the previous year’s contracted services that promoted and cultivated parent involvement and student academic achievement through skill-building, resource linkage, advocacy, and individual service plans.</p> <p>*Projected Outcomes*</p> <p>This program is expected to serve 40 Native families. Youth advocates will work in schools to build relationships with youth participants, families and educators. Advocates will work with the student and their family to develop a student directed six-month Individual Service Plan. Youth Advocates will work one-on-one with the youth and families to foster parental engagement in the schools. Participating families will recognize their need to increase involvement with their child’s schooling and 75% of youth will increase school engagement.</p>		
Self Enhancement Inc.	Humboldt, Jefferson	\$150,000
<p>*Summary*</p> <p>The focus of the program is to provide outreach to families to support Parent Involvement Policies, strategies and activities at both Humboldt Elementary and Jefferson High School. In partnership with Black Parent Initiative, SEI Parent Coordinators and SEI In School Coordinators are responsible for supporting parents and schools in advancing the goals of this program.</p> <p>*Projected Outcomes*</p> <p>This program will engage 30 families at Jefferson and Humboldt schools. Schools will show a 20% increase in their parent involvement practices at the end of the school year as compared to mid-year on the "Measures of School, Family and Community Partnerships Survey (<u>Communications</u> and <u>Learning at Home sections</u> ratings of items at "three" or higher. Eighty percent of Humboldt 2nd and 6th graders will participate in the family homework program and one third of Humboldt 6th graders will show improvement on at least one of their academic priority designations. At Jefferson, 60% of Sophomore students will be on track to graduate.</p>		



School Climate Survey 2011-12

We want to know what you think about your child's school. Your input will give us information that allows us to continue to provide Portland children with a quality education. Please take a moment and give us your honest opinions. Because this survey is anonymous, **do NOT write your name or any other identifying information in the comments box below.** Your responses to this survey will give us information to help us make those improvements. If you think the statement doesn't apply to your child or this school, please skip it and go on to the next statement. If you have more than one child at this school, please think of the oldest one as you complete this survey.

School Name: _____

Caring Environment

- | | Always | Almost always | Sometimes | Rarely | Never | Don't know |
|---|--------|---------------|-----------|--------|-------|------------|
| 1. When I walk into this school, I feel welcome..... | (5) | (4) | (3) | (2) | (1) | (0) |
| 2. I am treated with respect at this school..... | (5) | (4) | (3) | (2) | (1) | (0) |
| 3. My cultural heritage is honored through events and activities at my child's school..... | (5) | (4) | (3) | (2) | (1) | (0) |
| 4. Students at my child's school are treated fairly no matter what their race or cultural background..... | (5) | (4) | (3) | (2) | (1) | (0) |
| 5. I feel welcome at PTA/parent group meetings..... | (5) | (4) | (3) | (2) | (1) | (0) |

Problem Solving

- | | Always | Almost always | Sometimes | Rarely | Never | Don't know |
|---|--------|---------------|-----------|--------|-------|------------|
| 6. I have a good working relationship with my child's teacher..... | (5) | (4) | (3) | (2) | (1) | (0) |
| 7. I can talk to the school principal when I need to..... | (5) | (4) | (3) | (2) | (1) | (0) |
| 8. This school has a clear process for addressing my concerns..... | (5) | (4) | (3) | (2) | (1) | (0) |
| 9. If school staff members can't help me, I know they will refer me to someone who can..... | (5) | (4) | (3) | (2) | (1) | (0) |

Communication

10. My child's teacher lets me know if my child is having a problem with (choose all that apply):

- Behavior
- Special projects
- Fitting in with other students
- Tests
- Homework
- Other (describe): _____

11. For non-English speakers:

It's easy to get an interpreter if I need one.....

12. I have an opportunity to provide input regarding important decisions at my child's school.....

- | | Always | Almost always | Sometimes | Rarely | Never | Don't know |
|--|--------|---------------|-----------|--------|-------|------------|
| It's easy to get an interpreter if I need one..... | (5) | (4) | (3) | (2) | (1) | (0) |
| I have an opportunity to provide input regarding important decisions at my child's school..... | (5) | (4) | (3) | (2) | (1) | (0) |

Survey Continues On Back Page...

School Climate Survey 2011-12

Student Progress

- | | Always | Almost
always | Sometimes | Rarely | Never | Don't
know |
|--|--------|------------------|-----------|--------|-------|---------------|
| 13. My child's teacher keeps me informed about how my child is doing in school..... | 5 | 4 | 3 | 2 | 1 | 0 |
| 14. I understand the standards my child is supposed to meet..... | 5 | 4 | 3 | 2 | 1 | 0 |
| 15. My child's teacher and the school give me useful information about how to improve my child's progress... | 5 | 4 | 3 | 2 | 1 | 0 |
| 16. At this school, my student(s) feel challenged to do their best. | 5 | 4 | 3 | 2 | 1 | 0 |

Satisfaction

- | | | | | | | |
|---|---|---|---|---|---|---|
| 17. I am satisfied with the quality of this school..... | 5 | 4 | 3 | 2 | 1 | 0 |
| 18. I would recommend this school to others..... | 5 | 4 | 3 | 2 | 1 | 0 |

19. What grade is your child in? List all if you have more than one child in the school.

20. My child is:

- American Indian/Alaskan Native Multiracial
 Asian White
 Black/African-American Other (please specify): _____
 Hispanic

21. What is the primary language spoken at your home? _____

22. What is the school doing that is most helpful to you as a parent?

23. Please share one thing that you wish the school would do to improve the learning experience for you and your child.

Thank you for your participation!

Portland Public Schools is an equal opportunity employer and educator.

Family Engagement Comparison - General Fund Only

Preliminary - Draft

Program	Category	2011/12 Amended FTE	2011/12 Amount	2012/13 Proposed FTE	2012/13 Proposed Amount
33000 - Community Svcs	Equity Coordinators	4.00	311,922	-	-
	Coordinator - Family Engagement	1.00	76,178	1.00	77,671
	Program Director - Family Engagement	1.00	113,444	1.00	115,425
	Culturally-specific FE Contracts*	-	550,000	-	1,000,000
	Community Agent Add'l Budget	-	24,858	-	25,182
Subtotal Program 33000		6.00	1,076,402	2.00	1,218,278
12914 - Bilingual Assessment Svcs**	Community Agents	10.00	439,198	9.50	423,662
22130 - Curriculum Development^	Manager - ESL (Bilingual Family Services)	1.00	90,733	1.00	91,383
23212 - Deputy Superintendent	Ombudsperson	1.00	79,813	-	-
Grand Total		18.00	1,686,146	12.50	1,733,323

Notes:

Family Engagement components as identified to the Budget Office during the Family Engagement Reorg that began in spring 2011

Personnel costs are fully-loaded including Group Health costs and wage-driven benefits

*Funding for these Culturally-specific Family Engagement Contracts was picked up by the General Fund as of 11/12. Previously this item had been funded through Title I

** Due to a reorganization, some of the Community Agent FTE shows in Program 26350 - Translation Services as of the 12/13 Proposed Budget

It appears that 0.50 Community Agent FTE was used to help create the proposed Language Line position, which is new as of 2012/13 Proposed

^ Due to a reorganization, the Bilingual Family Services Manger position shows in Program 26350 - Translation Services as of the 12/13 Proposed Budget

Sources:

BB Scenarios: 2011/12:11-Shakedown, 2012/13:7-Proposed

Budget Office 5/2/12

**2010-2011 Family Engagement
Title I**

SUMMARY	Dept Assigned		Funded by:	NOTE:
Community Engagement Contracts	Dept 5407	\$ 1,528,000	Title I ARRA	1
Community Engagement Contracts	Dept 5406	80,000	Title I ARRA	2
Parent Liasons (not community agents)	Dept 5408	125,040	Title I Carryover	3
Family Involvement Manager	Dept 5407	69,921	Title I Central	4
Mandated Title I (DPAC & Schools)	Dept 5407	170,531	Title I Central	5
Total		<u>\$ 1,973,492</u>		

NOTE 1:

Community Engagement Contract Number	Contractor	Contract Amt
PS57647	Catholic Charities	\$ 200,000
PS57628	IRCO	238,000
PS57685	Latino Network	234,000
PS57630	NAYA	200,000
PS57626	Neighborhood House	200,000
PS57647	Northeast Coalition of Neig	240,000
PS57629	Volunteers of America	216,000
TOTAL		<u>\$ 1,528,000</u>

NOTE 2:

Community Engagement Contract Number	Contractor	
PS57977	Self Enhancement Inc	<u>\$ 80,000</u>

NOTE 3:

5.20 FTE, 17 ESL staff	<u>\$ 125,040</u>
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NOTE 4:

1.0 FTE, 1 staff	<u>\$ 69,921</u>
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NOTE 5:

Projected 10-11 Total Title Allocation	\$ 17,053,131
DPAC Set Aside (5%)	8,527
Remaining for Schools	162,005
Total Required 1% for Family Inv.	<u>\$ 170,531</u>

2011-12 Family Involvement Set Aside Expenditures
a/o 4/27/12

Dept. #	School	Allocation	Total	Remaining
			Exp	Balance
1136	Astor ES	\$ 2,701	\$ 436	\$ 2,265
1140	Beach ES	\$ 3,538	\$ 805	\$ 2,733
1141	Boise Eliot ES	\$ 3,628	\$ 3,607	\$ 21
1148	Chief Joseph ES	\$ 2,306	\$ 2,509	\$ (203)
1149	Creative Science School at Clark	\$ 1,345	\$ 260	\$ 1,085
1150	Cesar Chavez ES	\$ 4,758	\$ 6,106	\$ (1,348)
1164	Humboldt ES	\$ 2,600	\$ 988	\$ 1,612
1166	James John ES	\$ 3,673	\$ 1,692	\$ 1,981
1170	Markham ES	\$ 2,362	\$ 1,099	\$ 1,263
1175	Rosa Parks ES	\$ 4,657	\$ 4,252	\$ 405
1178	Ockley Green ES	\$ 2,690	\$ 1,650	\$ 1,040
1180	Peninsula ES	\$ 3,334	\$ 3,541	\$ (207)
1184	Sitton ES	\$ 2,905	\$ 2,876	\$ 29
1232	Arleta ES	\$ 3,119	\$ 1,993	\$ 1,126
1234	Atkinson ES	\$ 2,543	\$ 955	\$ 1,588
1238	Bridger ES	\$ 2,679	\$ 4,618	\$ (1,939)
1240	Harrison Park ES	\$ 7,132	\$ 3,431	\$ 3,701
1243	Creston ES	\$ 2,667	\$ -	\$ 2,667
1248	Faubion ES	\$ 3,504	\$ 1,961	\$ 1,543
1255	Grout ES	\$ 2,758	\$ 1,277	\$ 1,481
1258	Kelly ES	\$ 4,498	\$ 4,983	\$ (485)
1262	King ES	\$ 3,255	\$ 775	\$ 2,480
1264	Lee ES	\$ 3,933	\$ 759	\$ 3,174
1266	Lent ES	\$ 5,425	\$ 3,683	\$ 1,742
1267	Lewis ES	\$ 1,831	\$ 895	\$ 936
1276	Rigler ES	\$ 4,815	\$ 6,053	\$ (1,238)
1268	Marysville ES	\$ 3,752	\$ 415	\$ 3,337
1278	Roseway Heights	\$ 2,475	\$ 1,055	\$ 1,420
1279	Sabin ES	\$ 1,774	\$ 1,045	\$ 729
1282	Scott ES	\$ 5,176	\$ 5,204	\$ (28)
1284	Vernon ES	\$ 3,922	\$ 3,178	\$ 744
1286	Vestal ES	\$ 3,843	\$ 4,382	\$ (539)
1290	Whitman ES	\$ 3,300	\$ 4,705	\$ (1,405)
1294	Woodlawn ES	\$ 4,250	\$ 2,595	\$ 1,655
1296	Woodmere ES	\$ 3,764	\$ 3,869	\$ (105)
2156	George MS	\$ 3,549	\$ 543	\$ 3,006
2257	Hosford MS	\$ 2,859	\$ 3,823	\$ (964)
2263	Lane MS	\$ 3,809	\$ 1,736	\$ 2,073
3118	Jefferson HS	\$ 4,826	\$ 7,137	\$ (2,311)
3330	ACT HS	\$ 2,373	\$ 1,543	\$ 830
3331	SEIS HS	\$ 1,695	\$ 1,356	\$ 339
3332	POWER HS	\$ 2,181	\$ 2,125	\$ 56
	SEI Academy	\$ 1,322	\$ -	\$ 1,322
	Private Schools	\$ 10,803	\$ 460	\$ 10,343
	DPAC	\$ 8,125	\$ 7,028	\$ 1,097
			\$ -	\$ -
TOTAL		\$ 162,454	\$ 113,402	\$ 49,052



PORTLAND PUBLIC SCHOOLS

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SUPERINTENDENT'S RECOMMENDATION TO THE BOARD AND STAFF REPORT

TITLE: CREATE FUNDS 338 AND 438, RE-OPEN AND RE-NAME FUND 305

Board Meeting Date: May 29, 2012

Executive Committee Lead: Neil Sullivan, CFO

Department: Finance / Budget

Staff Lead: Zhai Logan, Budget Director

I. ISSUE STATEMENT

Board Resolution No. 4545 authorized Portland Public Schools to obtain a line of credit not to exceed \$45 million in order to finance the purchase Rosa Parks Elementary School, the conversion of school building boiler burners from oil to natural gas, and repay a previous line of \$25,750,000.

The District's current fund structure is not sufficient to properly account for this work.

II. BACKGROUND

- On February 13, 2012, by way of Resolution No. 4545 the Board of Education ("Board") of Portland Public Schools ("District") authorized obtaining one or more lines of credit, not to exceed \$45,000,000, to finance the purchase Rosa Parks Elementary School and the conversion of school building boiler burners from oil to natural gas, as well as the repayment of a previous line of credit in the amount of \$25,750,000.
- Resolution No. 4545 also called for this activity to be conducted in Fund 405 – School Modernization Fund. Subsequently it has been determined that repayment of the line of credit should remain in Fund 405 and the purchase of Rosa Parks and the boiler conversion work would be conducted in a new capital projects fund.
- In an effort to maintain and extend the useful life of its facilities, PPS has allocated resources from the District's General Fund towards capital improvement projects on an annual basis. This work has been conducted through the District's Facilities Asset and Maintenance department. Government Accounting Standards call for capital construction and improvement work to be conducted in a capital projects fund, rather than a general fund.
- Government Accounting Standards also require a method to ensure proper segregation of debt repayments for each debt issue. New debt service funds are needed to account for principal and interest payments resulting from this activity.
- It is District practice to match a 400 series capital projects fund with a corresponding 300 series debt service fund. Fund 305 was used previously as the debt service fund for a previous general obligation bond issue, but has been closed since July 2007.

III. RELATED POLICIES/BEST PRACTICES

Government Accounting Standards require a method to ensure proper segregation of debt repayments for each debt issue. Government Accounting Standards also call for capital construction and improvement work to be conducted in a capital projects fund, rather than a general fund.

IV. FISCAL IMPACT

There is no fiscal impact resulting from the creation of new funds. This action will allow the District to better manage and report on actions that have already been authorized by the Board.

The creation of the new funds will have a budgetary impact in that the District's gross budget will be increased as authorized by previous resolutions. For example, this provides a budget for the planned purchase of Rosa Parks Elementary.

V. COMMUNITY ENGAGEMENT

There was no community engagement in developing this recommendation.

VI. BOARD OPTIONS

The Board could choose to operate without the additional funds. The risk is continued inconsistency in managing and reporting capital projects and long term debt service.

VII. STAFF RECOMMENDATION

Staff recommends establishing the three new funds to improve District financial management and transparency in reporting.

VIII. TIMELINE FOR IMPLEMENTATION/EVALUATION

This change would be effective for FY 2011/12. The new funds may be included in an amended budget for FY 2011/12 and have been included in the Superintendent's Proposed Budget for FY 2012/13.

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



Carole Smith
Superintendent
Portland Public Schools

5/4/12
Date

ATTACHMENTS

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

- A. Resolution to Re-Open and Re-Name Fund 305.
- B. Resolution to Establish Two New Funds: Fund 338 - Facilities Capital Debt Service Fund and Fund 438 - Facilities Capital Fund.

PPS District Priorities FY 2011-12

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

RESOLUTION No. xxxx

Establish Two New Funds: Fund 338 - Facilities Capital Debt Service Fund and Fund 438 - Facilities Capital Fund

RECITALS

- A. School Districts should maintain only those funds that are required to meet legal and operating requirements
- B. In an effort to maintain and extend the useful life of its facilities, Portland Public Schools ("District") has allocated resources from the District's General Fund towards capital improvement projects on an annual basis. This work has been conducted through the District's Facilities Asset and Maintenance department ("Facilities").
- C. Government Accounting Standards call for capital construction and improvement work to be conducted in a capital projects fund, rather than a general fund.
- D. To better comply with Governmental Accounting Standards, a new capital projects fund will be created to record the resources and requirements resulting from capital improvement work conducted by the Facilities department.
- E. On February 13, 2012, by way of Resolution No. 4545 the Board of Education ("Board") of Portland Public Schools authorized obtaining one or more lines of credit, not to exceed \$45,000,000, to finance the purchase Rosa Parks Elementary School and the conversion of school building boiler burners from oil to natural gas, as well as the repayment of a previous line of credit in the amount of \$25,750,000.
- F. Resolution No. 4545 also called for this activity to be conducted in Fund 405 – School Modernization Fund. Subsequently it has been determined that repayment of the line of credit should remain in Fund 405 and the purchase of Rosa Parks and the boiler conversion work would be conducted in the new capital projects fund.
- G. Government Accounting Standards also require a method to ensure proper segregation of debt repayments for each debt issue. To facilitate this, a companion debt service fund will be created to record principal and interest expenditures resulting from this work.

RESOLUTION

1. The Board hereby establishes Fund 338 – Facilities Capital Debt Service Fund, which will separately account for principal and interest expenditures related to the District's capital improvement activities occurring in Fund 438.
2. The Board hereby establishes Fund 438, the "Facilities Capital Fund", which will separately account for resources and requirements resulting from the capital improvement work conducted by the Facilities department.

Neil Sullivan/Zhai Logan

RESOLUTION No. xxxx

Re-Open and Re-Name Fund 305

RECITALS

- A. On July 9, 2007, by way of Resolution No. 3727, the Board of Education ("Board") closed Fund 305 – General Obligation Debt Service Fund, which had been used to account for the principal and interest expenditures relating to previous general obligation bond issues.
- B. On February 9, 2009, the Board of Education of Portland Public Schools ("District") adopted Resolution No. 4032, affirming the need for the District to finance its immediate action highest priority projects from a variety of sources, including interfund loans.
- C. On February 23, 2009, by way of Resolution No. 4042 the Board authorized the creation of Fund 405 – 21st Century Capital Projects Fund to separately account for the resources and requirements related to the projects described in Resolution No. 4032.
- D. On February 23, 2009, the Board adopted Resolution No. 4043, authorizing an interfund loan to finance the projects described in Resolution No. 4032. The District subsequently made an interfund loan of \$25,750,000.
- E. Effective July 1, 2010 Fund 405 was renamed "Fund 405 – School Modernization Fund".
- F. On February 18, 2011, to preserve the District's ability to obtain low cost, tax-exempt financing, the Board adopted Resolution No. 4409, authorizing the District to obtain external financing for the interfund loan that was authorized by Resolution No. 4043.
- G. On February 23, 2012 by way of Resolution No. 4545, the Board authorized the repayment of the debt incurred by resolution No. 4409, by obtaining a line of credit not to exceed \$45,000,000. This resolution and line of credit also provided for the financing of Rosa Parks Elementary School and the conversion of school boiler burners from oil to natural gas.
- H. Resolution No. 4042 also stated, in part, that "A Debt Service fund may be required to manage the repayment of debt should such debt be issued by the District. The District will establish the required debt service funds when necessary".
- I. Government Accounting Standards also require a method to ensure proper segregation of debt repayments for each debt issue.

RESOLUTION

1. The Board hereby re-opens Fund 305 - General Obligation Bond Debt Service Fund" and re-names it Fund 305 – School Modernization Debt Service Fund, which will separately account for principal and interest expenditures related to the District's school modernization activities occurring in Fund 405.

Neil Sullivan/Zhai Logan



PORTLAND PUBLIC SCHOOLS

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

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

SUPERINTENDENT'S RECOMMENDATION TO THE BOARD AND STAFF REPORT

TITLE: MEAL PRICE INCREASES FOR 2012-13

Board Committee Meeting Date: May 7, 2012

Executive Committee Lead: Nick Jwayad, Deputy COO

Department: Nutrition Services

Staff Lead: Gitta Grether-Sweeney, Director of Nutrition Services

District Priority: Build shared leadership and accountability for results

I. ISSUE STATEMENT

The United States Department of Agriculture (USDA) and Oregon Department of Education (ODE) require equity in school meal pricing (Section 12 of the National School Lunch Act). Nutrition Services recommends that meal prices be increased by \$.10 this year and reviewed on an annual basis to both comply with this regulation and ensure that prices are manageable for families.

II. BACKGROUND

Board Policy **3.60.040-P Nutrition Services, Meal Pricing and Purchasing** requires the Board to establish prices for adult meals and student reimbursable meals.

The new Federal equity in school lunch pricing requirements stipulate that meals must be priced to cover the cost of producing them. When meals are priced below the cost of production it has the unintended consequence of increasing the Federal subsidies for higher income children. Federal funds for free/reduced price meals are being used to fill the gap between what a paid meal costs and what the district receives for it. On average, the paid meal price for lunch must be equal or greater than the amount of the free reimbursement (\$2.79) minus paid reimbursement (\$.28).

Nutrition Services operates as a self-funded operation relying on the revenue generated by serving meals that receive federal reimbursement and cash payments from families. Approximately 20% of revenue comes from cash sales and 80% from federal reimbursement.

Historically lunch prices have been increased by 10 cents for the last four years. Breakfast prices increased by 10 cents in the 2011-12 school year. The modest increases have been accepted by families and have not resulted in a decrease in participation in school meal programs.

This meal price increase is approved by the Board through adoption of the FY 12-13 budget.

III. RELATED POLICIES/BEST PRACTICES

Nutrition Services monitors meal pricing in Multnomah County and the surrounding metro school districts. In addition, data from Council of Great City Schools is used to benchmark the cost of producing meals in large urban school districts. Portland's meal costs are higher due to Farm to School initiatives and meeting higher nutrition standards such as increasing the consumption of fruits, vegetables and whole grains. These are goals the Federal Government will require for the 2012-13 school year.

IV. FISCAL IMPACT

The estimated increase in revenue with implementation of a 10 cent price increase is: \$96,000 for lunch. The revenue generated will be used to cover increased food, labor and distribution costs. In addition, increased revenue is required for the ongoing increase in labor cost for washing reusable school lunch trays.

V. COMMUNITY ENGAGEMENT

There is significant community engagement in Farm to School and Resource Conservation efforts. Families involved in these community groups strongly support paying more for meals to fund these initiatives. Historically the general community has not been involved in the discussion of meal price increases.

VI. BOARD OPTIONS

Nutrition Services requests the School Board approve a 10 cent price increase for lunch as part of FY 12-13 budget process to be effective September 1, 2012. While economic conditions are challenging for families, the small increase is more manageable for families than larger increases that would be required to maintain a self-supported Child Nutrition operation if increases were not made annually.

The other option to meet the Federal equity in school lunch pricing requirements is to supplement the Nutrition Services budget with other non-federal funds (e.g. general fund) to make up the difference between the cost of free reimbursement and the amount we receive from paying students. This is to ensure that free reimbursement is not subsidizing paid lunches.

VII. STAFF RECOMMENDATION

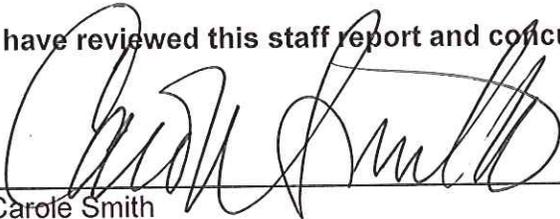
Nutrition Services recommends the following meal price increases:

	<u>Lunch</u> <u>2011-12</u>	<u>Proposed</u> <u>2012-13</u>
Elementary	\$2.40	\$2.50
6 th -8 th Grade	\$2.65	\$2.75
High School	\$2.90	\$3.00
Adult	\$3.95	\$4.00

VIII. TIMELINE FOR IMPLEMENTATION/EVALUATION

If approved, meal price increases would take effect September 1, 2012. Nutrition Services will communicate price increases through the Menu Calendar, cafeteria signage, school handbooks and newsletters, and the Administrators Connection. Meal participation will be monitored and an assessment of the effect on paying students will be reported.

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



Carole Smith
Superintendent
Portland Public Schools

5/4/12
Date

ATTACHMENTS

- A. Oregon Department of Education memo dated April 11, 2011.
- B. Equity in School Lunch Pricing Fact Sheet, USDA memo dated March 2, 2011.



OREGON DEPARTMENT OF EDUCATION
Public Service Building, 255 Capitol Street NE, Salem, Oregon 97310
Phone (503) 947-5600 • Fax (503) 378-5156 • www.ode.state.or.us

April 11, 2011

TO: Sponsors of the National School Lunch Program

RE: Equity in School Lunch Pricing Fact Sheet
Effective July 1, 2011

The Oregon Department of Education Child Nutrition Programs (ODE CNP) received guidance from USDA requiring sponsors of the National School Lunch Program to ensure that there is equity in school lunch pricing. The pricing equity requirement does not apply to the School Breakfast Program.

Please review the USDA memo and fact sheet carefully for aspects that pertain to your meal program(s). The provision is effective July 1, 2011.

Enclosed is the following information:

- USDA Memo, dated March 2, 2011
- USDA Fact Sheet, March 2011
- Pricing Example created by ODE CNP for clarification purposes

Clarification

Page 2 of the USDA Fact Sheet states: *The law caps the required increase in the average paid lunch price at 10 cents in any year.*

Section 12 of the Richard B. Russell National School Lunch Act (2)(B)(II) states:

(iii) Maximum Required Price Increase

(I) *In General – The maximum annual average price increase required to meet the requirements of this subparagraph shall not exceed 10 cents for any school food authority.*

(II) *Discretionary Increase - A school food authority may increase the average price for a paid lunch for a school year by more than 10 cents.*

If you have questions, please contact your assigned Child Nutrition Specialist.

Sincerely,

A handwritten signature in cursive script that reads "Heidi W. Dupuis".

Heidi Dupuis
Manager, School Nutrition
Child Nutrition Programs
Office of the Superintendent

K:\-Memo\SNP Memos-Unnumbered\2010-11\Equity in School Lunch Pricing\Memo 4-11-11.doc

Enclosure: USDA Equity in School Lunch Pricing Memo
USDA Fact Sheet
ODE CNP Pricing Example



United States
Department of
Agriculture

Food and
Nutrition
Service

3101 Park
Center Drive
Alexandria, VA
22302-1500

DATE: March 2, 2011

SUBJECT: Equity in School Lunch Pricing Fact Sheet

TO: Regional Directors
Special Nutrition Programs
All Regions

State Directors
Child Nutrition Programs
All States

This memorandum provides information relating to section 205 of the Healthy, Hunger-Free Kids Act of 2010 (Public Law 111-296). This provision requires school food authorities (SFAs) participating in the National School Lunch Program to ensure that schools are providing the same level of support for lunches served to students who are not eligible for free or reduced price lunches (i.e., paid lunches) as they are for lunches served to students eligible for free lunches. This provision is effective July 1, 2011.

An implementation memorandum will not be issued for this provision; the Food and Nutrition Service (FNS) expects to publish an interim rule by the provision's effective date. The public will have an opportunity to comment on the rule, and we anticipate issuing further guidance in conjunction with publication of the rule. The attached Equity in School Lunch Pricing Fact Sheet is meant to provide information to States and SFAs as they await the publication of the rule. We request that State agencies (SAs) provide the fact sheet to all SFAs as soon as possible.

SAs should direct any questions concerning this information to the appropriate FNS Regional Office. Regional Offices with questions should contact the Child Nutrition Division.

A handwritten signature in cursive script that reads "Cynthia Long".

Cynthia Long
Director
Child Nutrition Division

Attachment



1. What is the "Equity in School Lunch Pricing" Provision?

- Effective July 1, 2011, section 205 of the Healthy, Hunger-Free Kids Act of 2010 requires school food authorities (SFAs) participating in the National School Lunch Program to provide the same level of support for lunches served to students who are not eligible for free or reduced price lunches (i.e., paid lunches) as they are for lunches served to students eligible for free lunches. The Act directs SFAs to:
 1. Compare the average price charged for lunches served to students not eligible for free or reduced price lunches (i.e., students receiving "paid lunches") to the difference between the higher Federal reimbursement provided for free lunches and the lower Federal reimbursement provided for paid lunches.
 2. If the average paid lunch price is *less than* the difference, an SFA must either gradually adjust average prices or provide non-Federal funding to cover the difference.

2. Why is this provision important?

- Historically, there have been three main sources of funds provided to nonprofit school food service accounts: Federal reimbursements, paid meal revenues, and State and local funding. The Federal reimbursement for paid meals was designed to be minimal in relation to these other sources and has always been substantially less than the reimbursement for free and reduced price meals.
- Research indicates that average prices charged for paid lunches in some SFAs are less than the cost of producing those lunches.
- Pricing paid lunches below the cost of production effectively increases Federal subsidies for higher income children because Federal funds intended for free and reduced price lunches are being used to help fill in the gap between what a paid lunch costs and what the school receives for it. Children across all income levels are negatively affected by limiting the funds available to provide nutritious meals.
- This provision will help ensure that schools have funding available to support serving nutritious meals to all students.



3. Which SFAs will be affected by this provision?

- Not all SFAs will be required to adjust prices or find alternative sources of funding for paid lunches. Applying this provision using current Federal reimbursement rates, SFAs in the continental U.S. now charging, on average, \$2.46 or more for a paid lunch would not be required to adjust prices in school year 2011-12.
- An SFA in the continental U.S. currently charging, on average, less than \$2.46 for a paid lunch may be required to either gradually increase prices or provide additional non-Federal support for its lunches. To determine how much, these SFAs must calculate an adjusted average paid lunch price.
 - For school year 2011-2012, the adjusted average price is the average price charged in school year 2010-2011 increased by a factor equal to two percentage points above the inflation rate and may be rounded down to the nearest 5 cents. For school year 2011-2012, the inflation factor is 1.14 percent. Combined with the required annual 2 percentage point increase, the total adjustment required is 3.14 percent.
 - This year's relatively low food price inflation, combined with the ability to round down, means that for this coming school year, SFAs in the continental U.S. with lunch prices below \$2.46 in School Year 2010-11 would have to increase lunch prices by only five cents or not at all.
- In general, when the adjusted average price is more than the current price, an SFA would have to either increase its average paid lunch price to the adjusted average price or provide additional non-Federal support for its paid lunches. The law caps the required increase in the average paid lunch price at 10 cents in any year. Therefore, an SFA with a significant gap between its price and the required level will have several years to make adjustments to its prices and/or provide other funding to the SFA account in order to meet this requirement.

Clarification

Section 12 of the Richard B. Russell National School Lunch Act (2)(B)(II) states:

(iii) Maximum Required Price Increase:

- (i) *In General* - The maximum annual average price increase required to meet the requirements of this subparagraph shall not exceed 10 cents for any school food authority.
- (ii) *Discretionary Increase* - A school food authority may increase the average price for a paid lunch for a school year by more than 10 cents.



4. Will SFAs have control over establishing paid lunch prices?

- SFAs maintain significant local control in establishing the prices for paid lunches. SFAs may maintain low paid lunch prices if they ensure that sufficient funding from non-Federal sources is added to the school food service account to cover the required revenue. SFAs also may vary paid lunch prices by school (for example, charging lower prices in schools located in lower-income areas or charging different prices in elementary and secondary schools), as long as the average revenue requirement is met across the SFA.

5. Will families with incomes slightly above the threshold for free and reduced price meals be disproportionately impacted by this provision?

- This provision does not require that additional revenue be secured through paid lunch price increases. Revenue can be generated from any non-Federal source.
- By limiting the maximum required annual average price increase to 10 cents, the Act allows for a gradual increase in paid lunch prices, thereby minimizing the impact on families with incomes just above the level eligible for reduced price meals.
- SFAs can also choose to vary the price of paid lunches by school as long as the average paid lunch price across the district meets the requirement. Therefore, SFAs could choose to keep lunch prices lower in schools with higher concentrations of low-income students.
- USDA's analysis suggests that the effect on participation of a 5 or 10 cent increase in the price of a paid lunch is very small – less than a 5 percent difference even after many years of implementation. However, USDA will carefully monitor the implementation of this provision and any impact on participation.

Oregon Department of Education Child Nutrition Programs Pricing Examples

Pricing Example 1

Average Meal Price:

Elementary Paid: \$2.15
Middle School Paid: \$2.40
High School Paid: \$2.70

$$\$2.15 + \$2.40 + \$2.70 = \$7.25/3 = \mathbf{\$2.41}$$

Comparison Free Reimbursement

Free Reimbursement = \$2.72
Paid Reimbursement = \$.26
 $\$2.72 - \$.26 = \mathbf{\$2.46}$

\$2.41 is less than the free reimbursement rate so paid lunch price must be adjusted for inflation before determining the price increase.

Adjusted Average Paid Lunch Price

Inflation: 1.14% + 2 point increase = 3.14
 $3.14 \times 100 = .0314$
 $\$2.41 \times .0314 = .078$
 $\$2.41 + .078 = \mathbf{\$2.487}$

$$\text{Difference: } \$2.46 - \$2.487 = -\$0.027$$

No increase

Pricing Example 2

Average Meal Price:

Elementary Paid: \$2.25
High School Paid: \$2.75

$$\$2.25 + \$2.75 = \$5.00/2 = \mathbf{\$2.50}$$

Comparison Free Reimbursement

Free Reimbursement = \$2.72
Paid Reimbursement = \$.26
 $\$2.72 - \$.26 = \mathbf{\$2.46}$

$$\text{Difference: } \$2.46 - \$2.50 = -\$0.04$$

No evaluation to adjusted average paid lunch price needed.

Pricing Example 3

Average Meal Price:

Elementary Paid: \$1.85
Middle School Paid: \$2.00
High School Paid: \$2.30

$$\$1.85 + \$2.00 + \$2.30 = \$6.15/3 = \mathbf{\$2.05}$$

Comparison Free Reimbursement

Free Reimbursement = \$2.72
Paid Reimbursement = \$.26
 $\$2.72 - \$.26 = \mathbf{\$2.46}$

\$2.05 is less than the free reimbursement rate so paid lunch price must be adjusted for inflation before determining the price increase.

Adjusted Average Paid Lunch Price

Inflation: 1.14% + 2 point increase = 3.14
 $3.14 \times 100 = .0314$
 $\$2.05 \times .0314 = .06437$

Round Down to the nearest \$.05

Required revenue increase into the school service fund is \$.05 per paid lunch.