



Portland Public Schools

User Guide to Writing Policies

INTRODUCTION

The Legal and Community Engagement teams are here to support your efforts to recommend new or revised Policies or Administrative Directives (AD). We can guide you through the full policy/AD development, review, and maintenance process. Please contact Rachel Lent, rlent@pps.net (503) 916-3705 to get started.

You, as the policy/AD writer or subject matter expert, have the important task of reaching your intended audience with policies/ADs that are clear, concise, and provide the right level of information. Policies and ADs set and communicate our values, culture, and expectations across the District.

DEFINITIONS

Board Policy- High-level, governing document that is approved by the Board and lasts multiple years. Sets forth the purpose and prescribes in general the organization and program of a school system.

Administrative Directive- Detailed direction that implements the Board policy and is approved by the superintendent.

Procedures and processes, Handbooks and Plans- Department-level instruction and guidance on specific procedures and processes.

OVERALL GUIDELINES FOR POLICY/AD DEVELOPMENT OR REVISION

- Engage and meet with internal stakeholders and subject matter experts
- Engage the relevant community groups throughout the full policy/AD development process. Ensure the process includes opportunities for thoughtful feedback and discussion. This may include students, parents, teachers, administration, unions, and/or community groups. Develop an engagement and communication plan. Work with Shanice Clarke, Director of Community Engagement, sclarke@pps.net.
- Comply with applicable law, including any recent changes.
- Use as few words as possible to make a statement.
- Use simple language whenever possible.

- Use warm and inclusive language and remember that we're communicating to our own communities about children, learning, and supportive environments.

POLICY DEVELOPMENT PROJECT PLAN - PHASES 1-4

Policy/AD revision work may take anywhere from 2-8 months from the beginning of Phase 1 (Planning) to end of Phase 4 (Approval and Implementation). The phases of policy revision are also designed to ensure you are using the Racial Equity and Social Justice Lens, relevant robust engagement opportunities, a meaningful implementation plan, and evaluation and incorporation of feedback received.

PHASE 1 (Planning)

The first phase in the revision process is to develop a plan. This will include using the PPS Racial Equity and Social Justice Lens (RESJ) and protocols form, and may also include a plan for community engagement.

A. The PPS RESJ Lens is a critical-thinking tool which will be applied to PPS's internal systems, processes, resources, and programs to create increased opportunities for all students by evaluating burdens, benefits, and outcomes to underserved communities. Through consistent utilization of the RESJ Lens, we intend to strengthen equitable outcomes for every student.

The following RESJ Lens questions are a guide and will be considered when making decisions. [PPS RESJ Lens](#). Complete the form and meet with Dani Ledezma dledezma@pps.net to review the lens and alignment with RESJ.

B. Depending on the subject and breadth of changes, PPS staff, students, families, and/or community should be actively informed and engaged about proposed revisions and the implementation of new or revised policies/ADs. A Community Engagement Plan ensures the district informs key relevant stakeholders, seeks input, and makes information accessible.

The following [Community Engagement Project Planning Worksheet](#) is the comprehensive plan you will use to engage stakeholders. Complete the plan and meet with Shanice Clarke sclarke@pps.net to review, make any changes or additions, and generate ideas for engagement.

C. (Optional) If the Policy/AD creation and/or revision will have a fiscal impact, we encourage you to meet with our Finance Team to review. You will also need to be sure that the functional budget owner has input and sign off on the proposed changes.

- D. Create a timeline for implementation/evaluation and a communication plan to stakeholders after the Policy/AD is adopted.

PHASE 2 (Performing)

The second phase in the revision process is to implement the planning phase. This includes following the Community Engagement Plan and drafting proposed language to implement the policy/AD objective.

PHASE 3 (Review)

The third phase includes gathering further feedback, if needed, and using stakeholder input received to modify the draft policy/AD language.

PHASE 4 (Board Policy Committee/Superintendent review and approval)

The fourth phase is preparing documents for presentation to the Superintendent and, for policies, the Board Policy Committee. The following are requirements to begin review by the committee.

REQUIRED DOCUMENTS

Each proposed revised Policy or AD has three documents that are required to be completed before presenting to the Superintendent and Board.

1. A **redlined** document showing the changes made to the current version (unless it is a new policy or AD).
2. A clean, formatted document that incorporates the proposed revisions.
3. A Staff Analysis and Report.

The Staff Analysis and Report will provide a detailed summary of the thinking behind the proposed changes and will inform the Board and/or Superintendent of the planning, analysis, and engagement done throughout the process. The answers should provide complete and relevant information. The report will also help to guide the work that you do and ensure the important areas of analysis are covered in the proposed revision.

STAFF ANALYSIS REPORT FOR POLICIES and ADs

The following are suggested questions and tips for completing a thorough analysis in the staff report:

BACKGROUND

History of the policy revisions, timing issues, legal updates. What is the reason for the revision?

RELATED POLICIES/BEST PRACTICES

What are related policies and administrative directives? What is the best practice in this subject matter? Describe any best practice research used to support the recommendation.

ANALYSIS OF SITUATION

What will happen if the revisions are made or not made? What are the implications?

FISCAL IMPACT

Outline the financial impact. Include implications such as extra staff time, materials, training.

COMMUNITY ENGAGEMENT

Portland Public Schools seeks to provide internal and external stakeholders transparency and voice in district decision-making and policy change. PPS also gains insight that positively impacts policy creation by considering the lived experiences of diverse students, parents, and communities.

1. Describe the level of advisory, influence, or partnership the proposed revision has from stakeholders, including but not limited to:
 - a. [Internal audiences] SUN Program Managers, PAPSA, SEIU, PAT, PAPSA, District Student Council/Student Board Representative. [External audiences] District-wide Advisory Councils, School or Community-based Parent Equity Groups, student organizations, PTAs, culturally specific community partners, community/national experts.
2. Articulate how the proposed revision achieves mutually beneficial relationships with students, parents, staff, and community.

RACIAL EQUITY AND SOCIAL JUSTICE LENS

- 1) How have you intentionally involved stakeholders who are affected by this policy, program, practice, or decision? Is there support or opposition? Why?
- 2) Does the proposed policy/AD address barriers to equitable outcomes?
- 3) Describe how the policy/AD revisions critically examine and alter practices.

TIMELINE FOR IMPLEMENTATION/EVALUATION AND COMMUNICATION PLAN

- 1) What is your communication plan to stakeholders after the policy/AD is approved?
- 2) How will the revisions to the drafted policy be implemented after community engagement? Timeline?
- 3) How will progress be measured on goals?
- 4) What cultural cycles, norms, patterns, and practices are expected to change after this policy/AD revision?

- a) What is the transition plan to support the proposed change to staff or student cycles, norms, patterns, or practices?

STAFF RECOMMENDATION

Convey the specific recommendation on any and all of the options listed or overall recommendation regarding the revision.

PROCESS FOR APPROVAL OF REVISIONS

When you have completed the policy or AD development process, you can proceed forward with review to the Superintendent and Board.

POLICIES

The senior lead responsible for the policy will review and sign the final Staff Analysis Report to the Board. Superintendent review followed by the Board Policy Committee is the first step to begin review of your suggested revisions. Please contact Rachel Lent in the Office of General Counsel rlent@pps.net to start this step. Once the revisions are reviewed and approved by the Policy Committee, the Board Office will schedule a First Reading at a regular meeting of the Board, which means the policy will be posted on the District website and discussed at the meeting. The public may comment on the policy for 21 days after the First Reading. There may be additional revisions to discuss as a result of the public comment period. After the public comment period is over, a Board vote is required to adopt the policy in the final form. [1.30.020-P Policies and Administrative Directives](#).

ADMINISTRATIVE DIRECTIVES

The senior lead responsible for the administrative directive will review and sign the final Staff Analysis Report to the Superintendent. Once the report is signed, please provide the required documents (Staff Analysis Report, redlined revisions, and clean formatted final copy) to Rachel Lent in the Office of General Counsel rlent@pps.net. Our office will move the work forward to the Superintendent for signature. Once the revisions have been approved by the Superintendent, our office will notify the senior lead, department lead, and/or staff lead and also share the revisions with the Board as an information item.

AFTER BOARD ADOPTION OR SUPERINTENDENT APPROVAL

When the revisions to a policy are adopted, or an AD is approved, the General Counsel's office will place the revised version on the District's policies webpage. The original documents are submitted to our office where the documents are maintained and archived.

It is the responsibility of the senior lead, department lead, and staff lead to ensure the communication and implementation plans that were developed during the process are completed on time, including ensuring that both internal and external stakeholders are notified and that any other implementation practices (training, written procedures, other) are put into action.

We also recommend that you review District web pages for links to the former policy and ensure the new policy is linked correctly. Please notify others who have links on department webpages to do the same and review any other public-facing web content or collateral materials that need to be updated or removed.

As always, please contact us with any questions throughout the development process. We are here to help!

Contacts:

Policy Development Process

Rachel Lent rlent@pps.net (503) 916-3705

Racial Equity and Social Justice Lens

Dani Ledezma dledezma@pps.net (503) 916-3769

Community/Stakeholder Engagement and Communication Plan

Shanice Clarke sclarke@pps.net (503) 916-3962

[RESJ Lens](#)

[Community Engagement Project Planning Worksheet](#)

[Staff Analysis Report to the Board](#)

[Staff Analysis Report to the Superintendent](#)