

Recommendation progress report for *ODE and PPS Must Do More to Monitor Spending and Address Systemic Obstacles to Student Performance, Particularly at Struggling Schools*, issued January 9th, 2019.

Please complete this form by selecting the status of the recommendations and providing an overview of steps you have taken to address them. There are three options for a recommendation status:

- **Implemented/Resolved:** The auditee has fully implemented the recommendation or otherwise taken the appropriate action to resolve the issue identified by the audit.
- **Partially implemented:** The auditee has begun taking action on the recommendation, but has not fully implemented it. In some cases, this simply means the auditee needs more time to fully implement the recommendation. However, it may also mean the auditee believes it has taken sufficient action to address the issue and does not plan to pursue further action on that recommendation.
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RECOMMENDATIONS 1-2 directed to ODE

RECOMMENDATION 3

Responsible Party - Claire Hertz, Sharon Reese

Investigate and report on potential savings areas in depth, including the level of executive administration, use of substitute teachers and educational assistants due to educator absences, health benefits, bus services, legal services, and building utilization.

Status: Implemented

Explanation:

- a) **Executive Administration** - Annual budgeting processes for the years following the SOS audit include a review of organizational structure and staffing at the executive level.
- b) **Substitute teachers and use of paraeducators** - Since educator absences appear to be driven to some degree by an escalation in student behaviors (reported in school districts across the state and nation), PPS has increased its capacity for behavioral supports and expanded professional development opportunities. We prioritized funding for behavioral and social-emotional supports for students and Multi-Tiered Systems of Support (MTSS).

In 2018-19, we budgeted for additional Assistant Principals or school climate specialists for schools with a single administrator to ensure additional support for behavior needs; because of the COVID-related reduction in state funding for 2020-21, we had to cut some of those positions, but our intention is to minimize or eliminate single-administrator sites as funding permits. We continue to work on professional development opportunities for principals and educators to support their work of identifying and addressing the needs of diverse learners. (See Recommendation 18.)

In addition to work with principals and educators, we are also investing in supports for substitute educators, including targeted training on social-emotional supports. Due to the governor's orders re distance learning during the pandemic, use of substitute educators has been significantly reduced.

- c) **Transportation Services** - In an effort to improve service reliability, student safety, and cost effectiveness, PPS plans to issue a new and substantially revised RFP for transportation services before the end of December 2020. The RFP envisions a 6-year initial term, with the option of two additional two-year extensions. This ten-year timeframe will allow vendors to plan expenses based on a standard depreciation schedule for vehicles. We anticipate that this will produce a 2% cost escalation year-to-year and believe the new system will provide greater predictability of costs over time.

The new RFP calls for two contractors to service the District as opposed to one. Requiring two contractors will inject some market competition that, we believe, will lead to increased stability in the driver workforce because of more competitive wages and benefits. It will also increase the expectation for high customer service. Should a contractor be unable to provide the service as required, the work will be assigned to another provider. In addition, the new RFP specifies that there must be a bus yard located on the west side of the Willamette River. This change will reduce miles traveled by empty buses, reduce response time for incidents of breakdowns or failures, and reduce costs through these efficiencies, while producing higher customer service for families and schools.

New digital camera systems and radios on buses will also provide greater accountability and support enhanced safety for our students.

With this new RFP and the intent to award two contractors with work, the District has planned for a long lead time for implementation. This lead time is necessary in order to ensure the acquisition of property and new vehicles for those receiving the contracts. The intent of this procurement process is to have awarded and negotiated contracts prior to June of 2021. As PPS has a current contract with First Student that expires on June 30, 2022, this allows a full year for lease or purchase of land for bus yards and for the purchase of new vehicles and equipment needed to service the contracts.

With that date in mind, the projected schedule for the procurement process milestones is:

Issue the RFP: Early December 2020
Proposal due date: February 2021
Evaluation: March 2021
Award and negotiations: April-May 2021
Board Approval: May 2021

- d) **Legal Services** - The District continues to pursue cost-saving strategies in its management of broad-based legal services through internal and external counsel. District strategies include largely holding the line on hourly rates charged by its diverse portfolio of outside law firms over several years (and even negotiating reduced rates in some instances) and using smaller legal providers that have lower billing rates when appropriate; utilizing fixed-fee agreements when possible; deploying a matter-management system to track and manage claims and create trend-reporting capabilities; and pursuing resolution of claims before they ripen into litigation. We continue to provide regular updates to the Board in writing and in Executive Session on pending claims and cases, and trend reporting on filed cases and tort claim notices.
- e) **Facilities Usage** - The District awarded an RFP for contracted services in Spring 2019 to facilitate an Enrollment and Program Balancing process district-wide. The Enrollment and Program Balancing process began in Fall 2019 with the Board's review of policy and approval of the proposed scope of work in February 2020. The Board framed the work around the following core values and outcome goals: Optimize the Use of Facilities, Support Equitable Programming, and Minimize Program Co-Locations.

Comprehensive analysis and development of a phased district-wide enrollment balancing plan was completed and shared with the community in the spring of 2020. A phased implementation plan using a regional approach began with the first phase of the SE Guiding Coalition scheduled for Spring 2020. The coalition work was delayed due to the pandemic and restarted in a virtual process in September 2020. The Enrollment and Program Balancing process is an iterative process of continuous improvement, based on extensive community engagement in six languages, consistent application of a racial equity and social justice lens. .

The SE Guiding Coalition has been broken into two phases for opening a new middle school and immediate needs to respond to overcrowding to be recommended to the Board by January 2021 for implementation in Fall 2021. The Coalition will continue its work in the spring of 2021 for changes to be implemented in Fall 2022. Next, the district will address the North/Northeast region of the district with a process scheduled for 2021-22 and implementation in future years.

Outside of this work, the district has found a remedy to reunify the Access Academy program (split into two co-located locations in 2018-19) at a single central location in the winter of 2021-22.

- f) **Employee Benefits** - Annual budgeting processes for the years following the SOS audit include a review of benefit plans and costs. The Board sets parameters for a balanced compensation package when bargaining with each employee group.

RECOMMENDATION 4

Responsible Party - Claire Hertz

Conduct regular and public peer benchmarking to identify potential savings areas and spending challenges. Identify peer districts using objective criteria, such as enrollment, level of poverty, and other demographic factors.

Status: Implemented

Explanation:

The district has purchased Forecast 5 and utilizes multiple benchmarking tools to compare to the large districts in Oregon and especially focuses on the largest districts, Beaverton and Salem-Keizer. The quarterly financial reports to the Board include a [benchmarking summary](#) of student demographic, expenditure appropriation comparison, cost per student comparisons, teacher salary comparisons, per FTE spending, and staffing ratio comparisons. In addition, the report shows that Oregon’s ranking for state-level expense per student improved over time to a mid-range position.

In addition, since Superintendent Guerrero joined PPS in 2017, we have participated in the Council of Great City Schools (CGCS) Key Performance indicators. We are about to submit data for the third year, 2019-20. The CGCS annual report is published in October and distributed to leadership across the district.

As part of the annual process for preparing the Superintendent’s proposed budget, tradeoffs are identified using benchmarking at both the state and national level using the tools mentioned above. In the 2020-21 budget process, \$12 million in reductions to the general fund were made across the district and reinvested in five strategic system shifts to support the implementation of the District’s Strategic Plan. (See Recommendation17.)

RECOMMENDATION 5

Responsible Party - Claire Hertz

Make the budget more clear and transparent to the public, including staffing and spending by program over time, key performance indicators, and analysis of key initiative outcomes.

Status: Implemented

Explanation:

In Spring of 2020, the Superintendent’s [proposed budget presentation](#), shared in a public Board meeting, was aligned to best practices recommended by the Government Finance Officers Association for school budgeting processes and the Association of School Business Officials International for budget document presentation. The [budget message](#) was grounded in the District’s vision (PPS reImagined), adopted in June 2019, to which both the district’s Student Investment Account [\(SIA\) Application](#) and the goals established by the Board were aligned. Five

system shifts to support the community-based vision served as the initial strategic plan for purposes of budget development: a connected and transformative school district, racial equity-aligned systems and structures, cultivating system-wide learning and a diverse workforce, transformative curriculum and pedagogy, and a culture of physical and emotional safety.

The Student Success Act community engagement processes in the fall and winter of 2019 included dozens of community meetings in six languages. PPS targeted three major groups: (1) students, (2) teachers and staff, and (3) community-based stakeholders and families. We explicitly partnered with community-based organizations to host sessions to gather feedback from each. Our Community Engagement team also held a series of sessions in classrooms with higher percentages of students identified in the SSA. We also targeted teachers and staff. Working with our labor partners, we designed and conducted a districtwide survey and asked that principals engage their school staff in conversation. Lastly, in the spirit of deeper collaboration with valued partners, Superintendent Guerrero welcomed service providers with expertise in both academic and culturally-specific programming to help analyze and interpret community and staff feedback, review the goals and aspirations of the district's vision, and discuss how PPS should prioritize its future investments.

The [Board goals](#), adopted in the Fall of 2019 and updated in August 2020, are likewise grounded in the district [vision](#), strategic plan, and theory of action. These investments have evaluation and metrics to share over a multiyear process to track student performance and school improvement. The district hired Dr. Russell Brown as the Chief of Systems Performance, a well-respected leader whose research background includes the design and management of program assessments, accountability structures and boundary review processes. Both the general fund budget and the SIA funding were aligned with the identified strategic priorities and Board goals, and the Board is publicly briefed on a quarterly basis on performance against the metrics.

The proposed budget for 2020-21 included a [Memo to the Board and CBRC](#) highlighting the improvements made in the presentation and process, the proposed [Budget Book](#) and [Individual School Reports](#) supporting the transparency and clarity requested by the board, Community Budget Review Committee and the community. In addition, for the 2020-21 budget process, we developed a new practice of including the CBRC in Board work sessions on strategic planning and budgetary priorities to ensure that CBRC members have the necessary data and strategic understanding to inform their recommendations.

The district has been awarded the Association of School Business Officials International, Meritorious Budget Award (MBA) for the past two years. The program recognizes districts for their skills in developing an effective budget presentation, compliance with clear budget presentation guidelines, commitment to the community through a reader-friendly budget document, and adherence to nationally recognized budget presentation standards.

The budget is guided by the board adopted [budget calendar](#) for the 2021-22 budget process, and includes an additional step of creating a [Five Year Financial Forecast](#). This tool will support the board in determining long term budget financial goals based on maintaining and growing General Fund reserves to 5-10% as established in board policy.

RECOMMENDATION 6**Responsible Party - Emily Courtnage**

Improve controls over purchasing card use. Improvements include requiring management review for at least non-standard and high-dollar transactions, and improving policy guidance on appropriate businesses purposes, taxpayer-funded meals, parties, student incentives, gifts, and use of unusual merchants. Also, the district should improve aggregate analysis of card use data to identify spending trends and unusual transactions.

Status: Implemented

Explanation: To improve controls over purchasing card use, the Purchasing & Contracting department implemented the following PCard program improvements: (1) Reimplemented the budget holder approval process requiring budget holders to review and sign off on all PCard transactions made by cardholders under their supervision, and developed a system for tracking and ensuring budget holder review; (2) Rolled out new Merchant Category Code restrictions prohibiting certain types of purchases (to be declined at point of sale); (3) Implemented a District-wide Amazon Business Prime account that allows visibility into all Amazon transactions and provides substantial savings as compared to individual department and school Prime accounts; (4) Developed revised interim guidance on acceptable use of District funds for purchases of meals and refreshments; interim guidance was then used to craft new Board Policy 8.30.010-P (District Use of Funds for Meals, Refreshments, and Gifts) and Administrative Directive 8.30.011-AD (Use of Funds for Meals, Refreshments, and Student Incentives); (5) Developed new PCard design to differentiate from common credit cards and reduce accidental use; (6) Developed and distributed an updated PCard Manual, revised infraction table, PCard Quick Reference guide, and online trainings incorporating all changes noted above; (7) Convened monthly PCard infraction review meetings with representatives from Purchasing, Finance, and HR to review and address cardholder infractions and failures to conduct budget holder review.

RECOMMENDATIONS 7-15 directed to ODE

In developing a common core curriculum for schools, ensure adequate training for teachers — particularly new or inexperienced teachers.

Status: Implemented

Explanation: In 2018-19, PPS launched the initial phase of our standards-based Guaranteed and Viable Curriculum (GVC), with a focus on Language Arts, Mathematics, and Science. During the summer of 2019, we hosted a districtwide professional learning institute multiple times that focused on deepening knowledge around implementing a standards-based core curriculum, high-leverage instructional practices, and assessment for learning strategies.

Building on the initial implementation, and professional development, the 2019-2020 school year saw the Office of Teaching & Learning providing multiple opportunities for educators across the district to come together and receive professional learning on GVC implementation. These efforts have been supported by our new content management platform, Atlas, which enables all teachers to collaboratively plan from our common, standards-based unit planners. This is a districtwide resource that has streamlined curriculum management. Additional content areas such as Social

Studies, Ethnic Studies, Pre-K, Arts, and Health & PE are continuing to develop their standards-based scope and sequence and accompanying units.

In March, 2020, the pandemic caused us to adapt the implementation of our curricula in order to meet the needs of students through our Home-Based Distance Learning. This included professional development sessions to help teachers work in a virtual space. This included both the use of digital tools as well as instructional strategies for a virtual classroom. As we entered into the fall, we shifted to the implementation of Comprehensive Distance Learning. As a result, the elements within the core curriculum (ie, scope and sequence, units, lessons, instructional tools), have been enhanced to work more effectively in a virtual environment. The work is defined by a comprehensive, standards-based core curriculum, units of study, and daily lessons.

The Office of Teaching and Learning has provided training for teachers, including new and inexperienced teachers in preparation for the start of the 2020-2021 school year. The trainings have focused on the use of teaching & learning tools (e.g. Atlas, Canvas, Seesaw, digital apps) and teaching strategies for a virtual environment. Professional development sessions have been provided in both synchronous and asynchronous formats. Trainings were offered over the summer and in the weeks prior to the start of the school-year. Additional professional development sessions, coaching, and drop-in supports have been provided to continue supporting new and inexperienced teachers.

RECOMMENDATION 17

Responsible Party - Jonathan Garcia

Develop a strategic plan that sets concrete performance measures for improved student outcomes and discusses in depth the staffing, resources, interim steps, and improvements to the district's operations and organizational culture needed to reach those outcomes.

Status: Partially Implemented

Explanation:

During the 2018-2019 school year, Portland Public Schools launched and completed a community-driven collective aspiration for the future of our graduates, educators and the school system. This "north star", [PPS reImagined](#), adopted by the Board in June 2019, focuses on what we want to be true for the graduates of the Portland Public Schools: "A graduate of Portland Public Schools will be a compassionate, critical thinker, able to collaborate and solve problems, and be prepared to lead a more socially just world."

The PPS Vision has four parts, the Graduate Portrait, Educator Essentials, Systems Shifts, and Core Values. The Graduate Portrait focuses on student outcomes, what they will know, who they will be, and what they will be able to do by the time they graduate. The Educator Essentials focus on attributes -- knowledge, skills, dispositions, and mindsets -- that adults in the District need to be able to support each student's attainment of the Graduate portrait. The Systems Shifts focus on creating conditions that enable PPS students and adults to grow and thrive, while the Core Values are the ethical principles that guide the District's actions in making the Vision a reality.

In the 2019-2020 school year, the senior leadership selected five of eleven system shifts to prioritize for the first in a series of multi-year strategic plans: a connected and transformative school district, racial equity-aligned systems and structures, cultivating system-wide learning and a diverse workforce, transformative curriculum and pedagogy, and a culture of physical and emotional safety.

Leaders developed a high-level work plan articulating a coherent set of priorities for the school year. PPS also solidified its system theory of action: targeted universalism. If we braid Racial Equity and Social Justice strategies into our instructional core, work with our students, teachers, and content, and build our organizational culture and capacity to create a strong foundation to support every student, especially our Black and Native American students, then we will reImagine PPS to ensure every student realizes the vision of the Graduate Portrait. This theory of action is embedded in the Board-adopted goals and associated metrics for the district. (See Recommendation 26 below.)

The District’s Vision and evolving Strategic Plan were ratified in the fall of 2019 by the feedback we received during the robust community engagement process that guided PPS’s plan for the new Student Success Act funding, including increased staffing for CSI, TSI, and Title I schools; significant investments in counseling and social work resources to promote student well-being; and development of improved infrastructure for targeted academic interventions, especially for under-served students of color and students experiencing disabilities.

The global healthcare pandemic and the subsequent economic crisis, combined with the social uprising against racial injustice, forced a shift in priorities to meet the immediate needs of the community, slowing down the Strategic Planning implementation. In October of 2020, PPS resumed its strategic planning effort, taking the 2019-2020 high-level work plan that was developed pre-pandemic, and setting 3-year strategies, goals, and actions related to implementing our vision. In addition to picking up where we left off on the 5 identified system shifts, we are working with PPS staff (classroom teachers, principals, counselors, operations staff, etc.) and students to identify strategies and actions to further progress toward the graduate portrait and educator essentials within our vision framework. All of this work is aligned to the proposed 2020-2021 Superintendent’s Budget, and will be completed in April 2021, with drafted strategies as early as February 2021.

RECOMMENDATION 18

Responsible Party - Brenda Martinek

Maintain a consistent feedback loop with teachers, educational assistants, parents, and other stakeholders regarding student conduct issues, particularly as they affect Title I schools and other high-poverty schools. Address teacher concerns about lack of clarity in school policies and lack of consistent behavior standards.

Status: Partially Implemented

Explanation:

In order to provide a consistent feedback loop with teachers, staff, parents, and principals regarding behavior expectations and how we work with students who need support, we needed to first put in place a multi-tiered system of support, review and modify the Student Handbook, and review/change policies related to student discipline and Health and Substance Free Learning Environments. Additionally we needed to research, train on, and implement a successful data tracking tool. Lastly, we needed to provide social emotional learning (SEL) support in order to provide proactive ways to teach and support students through restorative means as opposed to disciplinary measures when behaviors occur. By building a system of support, we will reduce over-identification of students (especially students of color) for special education referrals, and disproportionate discipline based on race.

a) New MTSS Department added:

In September 2018, a new multi-tiered system of support (MTSS) department was established. MTSS is a systemic, continuous improvement framework in which evidence and data-based problem solving and decision making is practiced across all levels of the educational system for supporting students across academics, behavior, and social-emotional wellness. The District contracts with a company that specializes in helping districts with coaching and professional development through an MTSS roll out. They provide ongoing professional development for educators. Title I schools are the primary focus for year one of our four-year roll out. The roll out will reinforce the coaching and support provided through the MTSS system for building administrators, teachers, and paraeducators. MTSS teachers on special assignment (TOSAs), are deployed to sites for in-school guidance support and coaching. In the 2020-21 school year, we have moved SEL into the MTSS department for further alignment in braiding MTSS, SEL, Racial Equity and Social Justice (RESJ), and Restorative Justice (RJ) practices together as one system of support.

(See MTSS department website for more information: <https://www.pps.net/mtss>)

b) Data tracking tool and coaching:

The District attempted to purchase a data tracking tool to collect academic and behavioral data to monitor students' progress and support provided. The tool was chosen in collaboration with the Office of School Performance, the Office of Teaching and Learning, and the System Planning and Performance department. Unfortunately, the company was not able to meet our needs and therefore we did not in the end purchase this data tracking tool. Once COVID happened this was one area that we put on the back burner. We are now at a point to prioritize this need again. What a data collection tool will do is align progress monitoring for academics and behavior across all departments. Once a tool is chosen, Title I schools have been prioritized to receive coaching and professional development support in the first cohort of schools, as described in the paragraph above. The MTSS supports and coaching will assist in aligning supports for students at any tier (level of need) in academics, behavior, and social emotional support. It is designed as a four-year roll out of coaching and supports all schools in the district.

c) Supports for students with substance use disorder and mental health challenges:

Like other school districts, PPS has seen a dramatic increase in the need for mental health support in most of our schools and all of our high schools. Teachers, building administrators, and parents have asked for more mental health supports for their students. PPS has increased investments in qualified mental health providers (QMHPs) to help students return to school from a treatment setting with a transition and recovery plan aligned to their treatment plan. Additional investments in mental health contracts with our community providers are helping to serve students regardless of their ability to pay or insurance status. New partnerships with community agencies and private funders are helping to supplement the costs of curriculum and training for all staff in drug and alcohol use prevention, mental health awareness, and suicide prevention. Additionally, SIA funds have supported additional funding for culturally specific mental health partners. Due to COVID, we have had to provide teletherapy options and increased other virtual resources. We also provide face-to-face contact with social workers who now go out to students' homes (on the sidewalk) to connect and check on some of our most vulnerable students.

Additionally, we have added a new policy on “Healthy and Substance Free Learning Environments” that employs a trauma-informed, restorative justice approach to support students struggling with mental health and/or substance use, as opposed to discipline and exclusion.

To serve students struggling with substance use disorder and mental health issues, PPS launched a five-year implementation plan for the Recovery, Education and Action for Healthy Living (REAHL) continuum of care on 11/1/2018. The culmination of this five-year initiative will be to open a recovery high school for students re-entering the school system after substance use disorder and/or mental health treatment. With SIA funds, we were able to hire our first ever CADC specialist, which is someone who has credentials in drug and alcohol and mental health. For many of our students who struggle with both, this is a crucial service that can now be afforded to them, regardless of insurability.

(See REAHL PPS website: <https://www.pps.net/Page/13092>)

d) Supports for students with behavioral challenges:

Under the 2016-19 contractual agreement with the Portland Association of Teachers (PAT), the district has invested in staffing to support a “Rapid Response Team” concept to assist with urgent behavioral needs identified by teachers and administrators. This team provides immediate, short-term assistance with additional staff, coaching, classroom management guidance, and the development of behavior support plans (BSPs) for students. The team collaborates with the Area Assistant Superintendents, special education (when appropriate), MTSS, and student success departments to ensure all of the necessary wrap around supports are provided for the student and family. Communication with the teacher and building administration is crucial for the success of the student.

(Rapid Response Team website information: <https://www.pps.net/Page/10113>)

From 2017-2020, in order to respond to urgent situations while building the MTSS capacity, the PPS Office of Student Support Services (OSSS) met regularly with PAT leaders to solve behavior-related issues before they became untenable for staff. A Behavior Collaboration Team (BCT) composed of PPS and PAT staff focused on historically underserved students and families and addressed issues such as discipline support, classroom management support, and other behavior related items. The work of this team has now been folded into the MTSS system, including improved behavioral interventions and protocols districtwide and specialized teams to deal with acute situations.

e) Student Threat Assessment Team:

The district has now fully implemented the Student Threat Assessment Team (STAT) process, based on the nationally-recognized model developed by the Salem-Keizer School District. PPS has dedicated centralized staff to support each school site’s multidisciplinary team (referred to as a “level one team,”) to address low- to mid-level threats. Student threat is defined as any communication or action intended to inflict pain, injury, damage or other hostile action on someone, either physically or psychologically. In these incidences, the central office supports

school sites by helping to identify threats of harm, and, if needed, facilitating a “level two team,” which is a community staffed team (including the school counselor, school resource officer, principal, and teacher) that meets weekly to review and assist with potential threats and supports available for the classroom teacher and administration. With the addition of counselors and social workers from SIA funds, we are now able to support students earlier in their crisis or behavioral concerns.

f) Discipline referral form and process:

The district enhanced the discipline referral reporting format to include additional information, including the disposition, plan for a student’s return, and any additional details for consideration. A streamlined reporting process allows any staff member to fill out an online referral form in the District’s student information database, Synergy.

The student handbook has been disseminated out to schools in all supported languages and is available online. There will be additional revisions incorporating additional student feedback for the handbook in 2020-21 to be implemented in the 2021-2022 school year.

g) Review of Board policies and student rights and responsibilities handbook:

In an effort to align district policy and practice, the MTSS team solicited extensive stakeholder engagement to update the Student Conduct and Discipline Policy and accompanying Administrative Directives. This policy has been substantially revised to employ a trauma-informed and restorative justice approach.

RECOMMENDATION 19

Responsible Party - Shawn Bird

Prioritize development and stability of effective principals by providing incentives and additional support, particularly at high-poverty schools. Supports include reducing turnover of principal supervisors, stabilizing district leadership, improving collaboration between principals and central administrators, improving hiring practices, streamlining initiatives, increasing collaboration between central office departments, and evaluating initiative results.

Status: Implemented

Explanation:

The Office of School Performance (OSP), the Office of Teaching and Learning (OTL), and the Office of Student Support Services (OSSS) provide focused and differentiated supports for all schools, but especially for our most impacted schools, that have been identified as needing improvement. In order to provide additional support to these buildings, our three offices have created a support 'Lab' Team with senior leaders from each office, who regularly visit, problem-solve, and collaborate with Principals. This team has been focused on providing coherent support for our key initiatives (Guaranteed Viable Curriculum [GVC] and Multi-Tiered Systems of Support (MTSS) and aligning central office support staff to effectively coach for implementation of key initiatives. During the first half of the 2020-21 school year, we’ve paused Lab Teams given the virtual environment , but we look forward to continuing the support of these teams when we return to buildings. In the meantime, Area Senior Directors, the administrators responsible for the supervision of Principals,

meet regularly with all Principals and are pushing into virtual classrooms to provide additional coaching and support.

We also host a monthly Leadership meeting for all school and district administrators and all school administrators meet at least monthly with their cohorts for targeted professional learning. Administrator cohorts are defined by school clusters and grade bands. Each Area Senior Director supervises a group of schools and brings together administrators from those schools for professional learning and collaboration. One focus area for cohort meetings for the 2020-21 school year is on further developing our work with Professional Learning Communities (PLCs) and supporting administrators in completing the PLC Self-Assessment with their teams. These sessions are designed in collaboration between the Office of School Performance and Office of Student Support Services, more specifically the MTSS Department. The other focus area for cohort meetings is to provide all PPS school leaders with a supportive and productive learning opportunity in self-selected racial affinity or accountability settings aimed to meet the learning target, which is to collaborate to create a supportive and productive space for learning, sharing, and growing as we develop our skills in anti-racist leadership.

Targeted supports for schools designated for Improvement by the State include leadership development from the University of Virginia Partnership for Leadership in Education (UVA-PLE) to help principals of these schools to function as turnaround principals. We are in the process of bringing on additional instructional coaching and support for principals at CSI schools as well.

We had planned to continue this year with our 2nd cohort of targeted MTSS trainings with school leadership teams and select teachers, but we had to postpone until next year given our current distance learning environment. We look forward to resuming that critical work once we return to buildings.

RECOMMENDATION 20

Responsible Party - Sharon Reese

Work with union officials to address transfer and hiring issues that promote high turnover and lower teacher experience at high-poverty schools. Also address remaining contract issues raised in the recent investigation of teacher misconduct, including retention of educator records and reducing administrative obstacles to filing a complaint.

Status: Partially Implemented

PPS is committed to reducing teacher turnover and improving supports to enhance teachers' work experience. For the 2019-20 school year and again through Student Investment Account engagement for 2020-21, PPS sought the input of PAT in advance of teacher hiring and staffing with a particular emphasis on additional staffing, supports, and educator professional development at high-needs schools.

PPS completed bargaining with PAT on teacher misconduct and retention of educator records in June 2019, resolving issues raised in the independent investigation of misconduct commissioned by the School Board. The Professional Conduct Between Adults and Students Policy (5.10.064-P) was adopted by the School Board on October 15, 2019.

Enhanced centralized support and resources for investigating misconduct complaints have been implemented, including hiring a Title IX Director and staff, offering specialized training, and creating and designating a School Compliance Officer at each school. The School Compliance Officers are trained to receive reports of bullying, harassment, and discrimination, provide safety planning for impacted students, support investigations, and ensure mandatory reporting. In addition, a new tracking system for allegations of employee misconduct was implemented in July 2019.

One final remaining item which has been delayed due to the pandemic will be addressed during successor bargaining for the PAT collective bargaining agreement. The district is exploring a proposal to provide targeted staffing, professional development, and incentives to work at designated high-poverty schools for educators. Originally scheduled to begin in March 2020, successor bargaining for the PAT contract has been on hold while the parties address bargaining issues arising from comprehensive distance learning and pandemic conditions and restrictions.

RECOMMENDATION 21

Responsible Party - Shawn Bird

While working to improve instructional quality, address other obstacles that create inequities at high-poverty schools. Strategies include changes to attendance rules, boundary changes, and practices that could encourage retention of high-quality principals and teachers at high-poverty schools, such as additional pay, enhanced training, and additional classroom support.

Status: Implemented

Explanation:

- a) CSI, TSI, and Title schools are receiving additional professional development support for the 2020-21 school year focused on GVC, MTSS, and leadership development to support teachers and school leaders, through a partnership with the University of Virginia. We are implementing incentive pay for substitute teachers at 18 high-poverty schools, which will work to address challenges with unfilled sub jobs at these schools. For the 2019-20 school year, FTE was allocated for assistant principals at 20 schools that did not qualify by formula for an AP. Those 20 schools are all identified as CSI, TSI, and/or Title I. CSI, TSI, and Title schools received more professional development supports beginning in the 2019-20 school year focused on GVC, MTSS, and leadership development to support teachers and school leaders, and this work continues as highlighted above. Other updates continue to be implemented and supported centrally. For the 2021-22 school year, we are continuing to analyze the opportunity to provide additional staff and support for high-poverty schools and those needing improvement.
- b) Previously, the PPS Board allocated funds to address enrollment imbalances and facilities utilization that are contributing to inequitable access to educational opportunities. The new staffing formula that was implemented for 2018-19 guaranteed that every school has sufficient staff to provide all students with a core curriculum, regardless of the enrollment. For longer term solutions to persistent enrollment imbalances, the District contracted with an external consultant, FLO Analytics, to assess, review, and make recommendations for

potential future changes to support enrollment and program balancing for implementation in the fall of 2021 and the fall of 2022. (See Recommendation 3.)

- c) Compensation for teachers is directly tied to contract negotiations with PAT (Portland Association of Teachers), per Oregon law. Due to the COVID-19 pandemic, contract negotiations with PAT have been focused on comprehensive distance learning and re-entry. The district is exploring a proposal to provide incentives for educators to work at high-poverty schools.

RECOMMENDATION 22

Responsible Party - Sharon Reese

Ensure consistent performance evaluation depth and quality by training administrators to set high expectations and improve the depth of reviews. Periodically review evaluations for quality.

Status: Implemented

PPS central leadership has established high expectations for all teacher evaluators and created structures to support skill building in this area. Professional development is designed and implementation has begun to improve the depth and quality of all performance evaluations. These professional development opportunities are designed to increase the instructional capacity of all school site evaluators, thus accelerating and improving student achievement.

Prior to the pandemic, central teams provided feedback through instructional walks, frequent informal school and classroom visits, leadership mentoring, coaching, and customized support for principals and leadership teams across all school sites. A cross-functional OSP and HR team conducts a quality review and coaching process for evaluations.

While the beginning of the pandemic led to the delay of teacher evaluations, PPS and PAT worked together this fall to create a comprehensive distance learning evaluation tool in alignment with Oregon Department of Education guidance. Administrators received training on the new tool in October and evaluations are continuing.

RECOMMENDATION 23

Responsible Party - Shawn Bird

Regularly track teacher and principal turnover and the number of initiatives at schools and publicly report on it, with a particular focus on high-poverty schools.

Status: Implemented

Explanation:

The District's strategic plan was designed to focus on the most critical goals to improve student achievement. PPS reImagined includes a common vision for our Graduate Portrait, Educator Essentials, and System Shifts to drive our Theory of Action. Given the Comprehensive Distance Learning environment we are currently operating in, we are taking this opportunity to revisit our three-year strategic plan and continue to streamline our initiatives as much as possible to prevent initiative overload throughout the execution of our multi-year plan. This ongoing process of collaboration and engagement will lead to common vision development and greater clarity for District goals and priorities, strategies, and tactics.

As mentioned previously, we are hyper-focused on GVC, MTSS, and leadership development, which should help to alleviate the feeling of overload that principals and teachers may have experienced in the past. Clear expectations will result in the ability to focus on specific, measurable initiatives and practices that will best address the District's most important and emerging priorities.

The district has enhanced its tracking of teacher and principal turnover, with a particular emphasis on measuring our goals of racial diversity. This data is available publicly. In addition, the district is rolling out additional questions in its annual school climate survey, scheduled for January, to include administrator perspective and experience on working conditions.

RECOMMENDATION 24

Responsible Party - Emily Courtnage

Adopt policies and practices that ensure strong management of contract and grant performance, particularly for non-competitive contracts and initiatives directly serving students, including consolidating contract management responsibilities.

Status: Implemented

Explanation: To improve contract management practices across the District's schools and departments, the Purchasing & Contracting department took the following steps: (1) Developed a mandatory Scope of Work Template for Student, Instructional, and Family Engagement Services for contracts originating in central office and involving provision of direct, ongoing, intensive support services to students and families; template includes more detailed scope, goals, deliverables, and performance measures; began publicly posting the specialized scope of work for applicable contracts on the Board agenda; (2) Procured and implemented a new Contract Management System to track, house, and provide visibility into all contract documents, data, workflow, and spend; includes extensive reporting and search capabilities as well as automatic email reminders to contract managers; includes integration with PeopleSoft Financial Systems to allow visibility into contract spend; will be accessible to all staff who manage or work with contracts; (3) Expanded the annual mandatory contracts training to include additional guidance on drafting an appropriate scope of work, inclusion of contract deliverables and performance measures, contract oversight duties during the course of the contract term, and review and documentation of contract performance and outcomes; new course is effective July 1 each year and must be taken by the contract manager and department/school contact before Purchasing & Contracting will review and approve the contract.

RECOMMENDATION 25

Responsible Party - Dani Ledezma

Use the strategic planning process to evaluate the most effective and efficient use of contracts designed to increase student performance.

Status: Implemented

Explanation:

In recognition of the power and potential of partnerships with culturally specific organizations, PPS adopted a Racial Educational Equity Policy (2.10.010-P) in 2011 that included this goal:

The District shall welcome and empower students and families, including underrepresented families of color (including those whose first language may not be English) as essential partners in their student's education, school planning and District decision-making. The district shall create welcoming environments that reflect and support the racial and ethnic diversity of the student population and community. In addition, the District will include other partners who have demonstrated culturally-specific expertise -- including government agencies, non-profit organizations, businesses, and the community in general -- in meeting our educational outcomes.

In alignment with the Racial Educational Equity Policy (2.10.010-P), PPS has contracted with several culturally specific organizations to support student success for nearly a decade. These contracts with partners were centrally administered and executed at a variety of school sites across PPS.

Recognizing the promise and potential of these partnerships, PPS included a goal in the 2019 RESJ Framework and Plan in the Community Partnerships section:

Increase effectiveness and alignment of PPS investment in education partnership contracts.

The development of this goal and resulting work to achieve the goal was prompted by a belief in the potential of deepened relationships, strong partnerships and collective action to achieve greater impact in services for students of color. To understand the existing body of work and opportunities for greater impact, we embarked on a comprehensive contract review process.

RESJ Partnership Contract Review

In early 2019, the Superintendent charged the Senior Advisor on Racial Equity and Social Justice with conducting a contract review process of PPS's RESJ partnerships and contracts. The review process consisted of both programmatic and administrative considerations including, but not limited to, effectiveness of programming, relationship development and management, services and education alignment, efficient contract development processing and management, process transparency, data collection, reporting and evaluation. The following essential questions were identified and considered in the review:

- What impact are the current services and agreements making on measurable student outcomes to close identified opportunity gaps?
- How are the current services and agreements aligned with current priorities, strategies, and efforts at PPS?
- Can PPS improve its contracting systems and processes to increase impact and effectiveness of this body of work?
- Are PPS and its partners set up to collect, analyze and publish data that tells the story of the impact of this body of work?
- Is this set of services, agreements, partners, and contracting processes the highest leverage strategy to achieve identified outcomes?

A collaborative approach to the review process was used by identifying and engaging internal and external stakeholders to answer these essential questions and to gather feedback on service needs, opportunities, and challenges related to the District's RESJ partnerships. Principals, contractors, and educational funders were interviewed and an extensive literature review was

conducted to identify evidence-based best practices. The findings of the review process pointed to several areas of improvement that were accomplished in the redesign. These included the importance of aligned contracts and partnerships to articulated strategies, the importance of transparency in contracting and procurement, the direct correlation between strong school site relationships and partner success and the importance of collaborative performance management.

In September 2019, the fiscal and contractual management of these contracts was reassigned to the Senior Advisor for Racial Equity and Social Justice by Superintendent Guerrero. During this time, both convened quarterly meetings with existing partners to strengthen the relationships with partners and amongst partners. During these meetings, we identified common challenges and opportunities within the existing funding framework while also discussing possibilities for redesign and greater collaboration. Several senior staff members, including many in the Superintendent's Cabinet, attended these meetings and contributed to discussions about redesign and the opportunities for greater alignment and increased funding through the opportunity of the Student Success Act.

PPS RESJ Partnership Investment Strategy

Synthesizing information from the contract review process, contract management and the quarterly partnership meetings, we developed the PPS [RESJ Partnership Investment Strategy](#). The investment strategy outlines values, strategies, and operational guidelines to inform funding allocation for the District's RESJ partnerships. In addition, the strategy is informed by relevant research that affirms the RESJ partnership strategies as effective in improving educational and social outcomes for students of color. Relevant research (see Appendix A) also affirms the approach to partner with culturally specific and multiracial organizations to implement these strategies.

At Portland Public Schools, our Theory of Action clearly states that if we braid Racial Equity and Social Justice strategies into our instructional core, work with our students, teachers, and content, and build our organizational culture and capacity to create a strong foundation to support every student, then we will reImagine Portland Public Schools to ensure every student, especially our Black and Native American students who experience the greatest barriers, realize the Vision of the Graduate Portrait. Research supported a set of 5 RESJ strategies with age groups in which each would be most effective:

- Culturally Specific Family Engagement (Pre-K-5)
- Wrap Around Services (High School)
- Mentoring and Leadership Development (Middle School)
- Extended Learning and Enrichment (Middle School)
- Positive Cultural Identity Development and Advocacy (Middle School)

This strategy document was utilized to develop budget requests for the 2020-21 school year and to inform the district's emerging Strategic Plan.

Through an environmental scan and conversations with other funders, the PPS RESJ Partnership Investment Strategy points out that the Portland community, other jurisdictions and funders (i.e. Meyer Memorial Trust, Multnomah County, Oregon Community Foundation (OCF), and Portland Children's Levy) are engaged in measuring the impact of education funding and an analysis shows notable alignment in outcomes. Many of our partners leverage other funding sources to deliver services across PPS. Because of this alignment and leverage, we believe there is significant potential for shared reporting and tracking of the impact of the partnerships moving forward.

PPS RESJ Partnership RFP

In April 2020, the District issued a Request for Proposals (RFP) for RESJ Partnerships for the 2020-21 school year. Successful proposers are able to renew their contracts for up to three years. The RFP asked respondents to submit proposals for services aligned to the PPS RESJ Partnership Investment Strategy for each of the strategies they intended to submit a proposal.

Proposers were also asked to align their service(s) and preferred school sites to prioritized schools outlined in the PPS RESJ Partnership Investment Strategy. One desired outcome of the RFP was to fund services at prioritized school sites aligned with school improvement strategies. School sites were prioritized by state identified improvement schools and an analysis of three indicators of disparity:

1. Disparity between the racial/ethnic diversity of students compared to racial/ethnic diversity of teachers
2. Disparity between Black/African American student achievement in Math/English and the school population
3. Disparity between Black/African American student growth in Math/English and the school population

Schools within each state-identified designation (CSI, TSI, Title I) were ranked according to the indicators. Since the prioritization of school sites, along with strategy alignment to age group, was a change from prior service contracts and to avoid potential interruptions of services, proposers were allowed to propose schools outside of the prioritized schools as long as a rationale that aligned to RESJ goals was provided.

In collaboration with Dr. Russell Brown, Chief of Systems Performance, we developed a logic model required in the RFP for proposers to submit. The logic model described proposers' theory of action for student impact as a result of the resources and services provided by the proposer. The logic model provides examples of how the proposer intends to meet the scope of work, as well as how success will be measured.

Program goals and impact will align with the recommended measures and reporting for partners as described in the PPS RESJ Partnership Investment Strategy. The recommended measures and reporting for partners identified in the RFP attempt to maximize the potential for shared reporting and tracking of the impact of the District's RESJ Partnerships. A revised shared report template will be developed in collaboration with the Office of Systems Performance at the conclusion of the contract negotiation process that all contractors will use for reporting during the school year.

The Department of Purchasing & Contracting conducted the RFP process. A bidder's meeting was held (virtually) and proposers' questions were published per procurement process protocols. Proposers were given 5 weeks to respond. Proposals were scored by a large and diverse group of PPS staff across several departments that include: Office of Systems Performance, Office of Student Support Services, Office of Teaching and Learning (Early Learning, Title I/Funded Programs), Office of School Performance (including school Principals), Office of Strategic Partnerships and Community Engagement, and Legal.

As part of the comprehensive redesign of the RESJ partnerships, we developed a logic model required in the RFP for proposers to submit. This information has been integrated into the contract goals and activities for each strategy listed below. Initial contract negotiations took longer than

anticipated because we have had to develop scopes of work for both in person and virtual programming, and these negotiations have taken place while a significant amount of uncertainty is in place. However, we coordinated across departments to try to ensure that there is clarity of purpose and expectation at the school sites as well as in the central office.

As each contract was approved, we met with the contractors, all school principals, staff from the Office of School Performance and the Chief of Systems Performance to continue to gather information to be integrated into a shared report template for evaluation. We developed a shared report form, convened contractors in November and are working across our partners to develop a coordinated evaluation framework to measure and report success of all five strategies.

RECOMMENDATION 26

Julia Brim-Edwards/Board of Education

The PPS Board should ensure that district administrators prioritize key steps to improve the efficiency and effectiveness of district operations, including:

a. Building an effective common core curriculum based on state standards and ensuring adequate school support and accountability for performance.

Status: Please choose Implemented; Partially Implemented; or Not Implemented

Explanation: Please provide a brief overview of steps your agency has taken to address the recommendation and the reasons why you believe the status is implemented, partially implemented, or not implemented. Please use the space you need, but one or two paragraphs per sub-recommendation may be adequate.

(drop in relevant "letter" content from other word doc. entitled: SOS audit template for evidence)

RECOMMENDATION 26

Board of Educations

The PPS Board should ensure that district administrators prioritize key steps to improve the efficiency and effectiveness of district operations, including:

b. Developing a strategic plan that focuses on long-term investment and measurement of results. The plan should also address the district's organizational culture, including improving the district's feedback loops and trust between central administrators, principals and teachers.

Status: Please choose Implemented; Partially Implemented; or Not Implemented

Explanation: Please provide a brief overview of steps your agency has taken to address the recommendation and the reasons why you believe the status is implemented, partially implemented, or not implemented. Please use the space you need, but one or two paragraphs per sub-recommendation may be adequate.

(drop in relevant "letter" content from other word doc. entitled: SOS audit template for evidence)

RECOMMENDATION 26

Board of Educations

The PPS Board should ensure that district administrators prioritize key steps to improve the efficiency and effectiveness of district operations, including:

c. Addressing inequities at high-poverty schools, such as high turnover, low teacher experience, and initiative overload.

Status: Please choose Implemented; Partially Implemented; or Not Implemented

Explanation: Please provide a brief overview of steps your agency has taken to address the recommendation and the reasons why you believe the status is implemented, partially implemented, or not implemented. Please use the space you need, but one or two paragraphs per sub-recommendation may be adequate.

(drop in relevant "letter" content from other word doc. entitled: SOS audit template for evidence)

RECOMMENDATION 26

Board of Educations

The PPS Board should ensure that district administrators prioritize key steps to improve the efficiency and effectiveness of district operations, including:

d. Improving the transparency and impact of the district's budget, including objective peer comparisons, analysis of results, and analysis of potential savings areas.

Status: Please choose Implemented; Partially Implemented; or Not Implemented

Explanation: Please provide a brief overview of steps your agency has taken to address the recommendation and the reasons why you believe the status is implemented, partially implemented, or not implemented. Please use the space you need, but one or two paragraphs per sub-recommendation may be adequate.

(drop in relevant "letter" content from other word doc. entitled: SOS audit template for evidence)

RECOMMENDATION 26

Board of Educations

The PPS Board should ensure that district administrators prioritize key steps to improve the efficiency and effectiveness of district operations, including:

e. Tracking and addressing teacher and principal issues with student discipline practices and priorities.

Status: Please choose Implemented; Partially Implemented; or Not Implemented

Explanation: Please provide a brief overview of steps your agency has taken to address the recommendation and the reasons why you believe the status is implemented, partially implemented, or not implemented. Please use the space you need, but one or two paragraphs per sub-recommendation may be adequate.

(drop in relevant "letter" content from other word doc. entitled: SOS audit template for evidence)

RECOMMENDATION 26

Julia Brim-Edwards/Board of Education

The PPS Board should ensure that district administrators prioritize key steps to improve the efficiency and effectiveness of district operations, including:

- a. Building an effective common core curriculum based on state standards and ensuring adequate school support and accountability for performance.

Status: Please choose Implemented; Partially Implemented; or Not Implemented

Explanation: Please provide a brief overview of steps your agency has taken to address the recommendation and the reasons why you believe the status is implemented, partially implemented, or not implemented. Please use the space you need, but one or two paragraphs per sub-recommendation may be adequate.

(drop in relevant "letter" content from other word doc. entitled: SOS audit template for evidence)