

## **Agenda**

- I. 6:00 pm - Opening
- II. 6:05 pm - Consent Agenda: Resolutions 6223 through 6224  
*Vote- Public Comment Accepted*
  1. RESOLUTION 6223: Expenditure Contracts that Exceed \$150,000 for Delegation of Authority
  2. RESOLUTION 6224: Revenue Contracts that Exceed \$150,000 Limit for Delegation of Authority
- III. 6:15 pm - Student and Public Comment
- IV. 6:35 pm - Student Representative's Report
- V. 6:40 pm - Superintendent's Report
- VI. 6:50 pm - Second Reading of a Policy
  1. Resolution 6225: Suicide Prevention Policy 4.30.050-P  
*Vote- Public Comment Accepted*
- VII. 7:05 pm - Update: COVID Metrics - Expanded
- VIII. 7:50 pm - Board Committee and Conference Reports
- IX. 8:00 pm - First Reading of a Policy
  1. Anti-Racist Learning Communities Policy 4.xx.xxx-P
  2. Professional Conduct Policy 5.10.064-P
- X. 8:20 pm - Resolution 6226 Resolution to Change Dr. Martin Luther King Jr. School Identity and Mascot Name  
*Vote- Public Comment Accepted*
- XI. 8:35 pm - Discussion: Enrollment Balancing Final Phase 1 Scenario for Southeast
- XII. 9:20 pm - Discussion: Election of School Board Members by Zones
- XIII. 9:35 pm - Resolution 6227 Approving Phase Two of the Internal Performance Audit  
*Vote- Public Comment Accepted*
- XIV. 9:45 pm - Board Leadership Vote
  1. Resolution 6228 - Election of Board Chairperson
  2. Resolution 6229 - Election of Board Vice-Chairperson
- XV. 10:05 pm - Other Business / Committee Referrals
- XVI. 10:10 pm - Adjourn

## RESOLUTION No. 6223

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

#### RECITAL

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

#### RESOLUTION

The Superintendent recommends that the Board approve these contracts. The Board accepts this recommendation and by this resolution authorizes the Deputy Clerk to enter into the following agreements.

#### NEW CONTRACTS

Contractor	Contract Term	Contract Type	Description of Services	Contract Amount	Responsible Administrator, Funding Source
Organization for Educational Technology & Curriculum (OETC)	1/13/21 through 10/31/21 Option to renew for up to three additional years through 10/31/24	Cooperative Contract COA 89653	Purchase of identity access management software and related support. Cooperative Procurement Group: OETC	\$349,568	C. Hertz Fund 299 Dept. 5581 Grant S0351

#### NEW INTERGOVERNMENTAL AGREEMENTS ("IGAs")

Contractor	Contract Term	Contract Type	Description of Services	Contract Amount	Responsible Administrator, Funding Source
North Clackamas School District	7/1/20 through 6/30/21	Intergovernmental Agreement IGA 89587	Columbia Regional Program and North Clackamas SD will partner to deliver regional services to eligible individuals with Autism Spectrum Disorder.	\$338,800	K. Cuellar Fund 205 Dept. 5433 Grant G1900

#### AMENDMENTS TO EXISTING CONTRACTS

Contractor	Contract Term	Contract Type	Description of Services	Amendment Amount, Total Amount	Responsible Administrator, Funding Source
Northwest Regional Education Service District	7/1/20 through 6/30/23	Intergovernmental Agreement IGA 89338 Amendment 2	Master service agreement with NWRESD. This amendment includes Follett Destiny Library hosting and support.	\$215,614 \$231,155	C. Hertz

**RESOLUTION No. 6224**

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

**RECITAL**

Portland Public Schools (“District”) Public Contracting Rules PPS-45-0200 (“Authority to Approve District Contracts; Delegation of Authority to Superintendent”) requires the Board of Education (“Board”) to enter into and approve all contracts, except as otherwise expressly authorized. Contracts exceeding \$150,000 per contractor are listed below.

**RESOLUTION**

The Superintendent recommends that the Board approve these contracts. The Board accepts this recommendation and by this resolution authorizes the Deputy Clerk to enter into the following agreements.

**NEW REVENUE CONTRACTS**

No New Revenue Contracts

**NEW INTERGOVERNMENTAL AGREEMENTS / REVENUE (“IGA/Rs”)**

No New Intergovernmental Agreements/Revenue Contracts

**AMENDMENTS TO EXISTING REVENUE CONTRACTS**

<b>Contractor</b>	<b>Contract Term</b>	<b>Contract Type</b>	<b>Description of Services</b>	<b>Amendment Amount, Contract Amount</b>	<b>Responsible Administrator, Funding Source</b>
Oregon Department of Education	7/1/20 through 6/30/21	Intergovernmental Agreement/Revenue IGA/R 68445 Amendment 1	Provide funding for Long Term Care and Treatment Educational Programs served by PPS.	\$4,528,600 \$9,814,700	K. Cuellar Fund 205 Dept. 9999 Grant: Multiple



## PORTLAND PUBLIC SCHOOLS

### OFFICE OF Student Success and Health Department

501 North Dixon Street / Portland, OR 97227

Telephone: (971) 291-0836

**Date:** January 5, 2021

**To:** Board Policy Committee

**From:** Mila Rodriguez-Adair, Qualified Mental Health Professional-On Special Assignment  
Amy Ruona, Sr Mgr Mental Health/Wellness Supports & Services  
Brenda Martinek, Chief of Student Support Services

**Subject:** Student Suicide Prevention Policy 4.30.050-P

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### **BACKGROUND**

SB 52, also known as Adi's Act, requires school districts to adopt a Student Suicide Prevention Policy, and Section 36 of the Student Success Act, also requires establishing support for Suicide Prevention through the development of a new statewide School Safety and Prevention System coordinated through the Oregon Department of Education's Office of Equity, Diversity, and Inclusion.

### **RELATED POLICIES/BEST PRACTICES**

It is best practice to implement policy to address the current law. This Policy on Suicide Prevention was created in collaboration with documents created by the American Foundation for Suicide Prevention, The American School Counselor Association, and the National Association of School Psychologists, and The Trevor Project. Suicide Prevention, Intervention, Postvention: Step by Step: Creating a Comprehensive Approach in your School created by Lines for Life and Willamette Education Service District.

### **ANALYSIS OF SITUATION**

Senate Bill 52 requires school districts to establish policies regarding student suicide prevention, intervention, and activities to reduce risk and promote healing after suicide. PPS currently has a suicide prevention curriculum available district-wide; student engagement groups; a suicide intervention protocol; a suicide screening tool; a safety and support plan; and guidance for return from mental health settings amongst other suicide prevention/intervention strategies. See [the attached document](#) for more details.

PPS school counselors, social workers, psychologists, and QMHP's (Qualified Mental Health Professionals) will receive annual training on these protocols and documents.



- PPS will continue to build out suicide prevention training for ALL staff district-wide through a variety of training opportunities. Suicide prevention is everyone’s responsibility not solely counseling or social work responsibility.
- PPS will continue to build out mental wellness supports at all tiers that support suicide prevention and particularly focus on our historically underserved students.
- PPS needs district-wide training for school teams to respond after death including suicide.
- As BIPOC students and LGBTQIA+ students are considered populations at high risk for suicide; increased school-based RESJ training with a multi-tiered approach to hate speech and discriminatory acts is essential.
- Suicide prevention occurs when students are seen, heard, and valued for being their true authentic selves. PPS needs to continue to build upon supports and interventions that celebrate all student identities. This looks like increased mentoring, GSA/QSAs, racial and cultural affinity groups, restorative practices, and other opportunities for supported self-expression.

Each school district must also implement a review procedure where an individual can request the school district evaluate the actions of a school in responding to suicidal risk.

The State Board of Education is called upon, by rule, to add any other requirements based on consultations with suicide prevention organizations, experts, and school-based mental health providers. School districts and Education Service Districts anticipate that policy development can be absorbed with current resources, but policy implementation costs could be substantial.

### **FISCAL IMPACT**

Costs related to the measure are indeterminate at this time. There may be some fiscal impact related to curriculum and additional suicidal prevention training for staff including LGBTQIA+ training.

### **COMMUNITY ENGAGEMENT (IF APPLICABLE)**

This policy is driven by legislative directives, and, given the pandemic, some stakeholder engagement was limited. SS&H worked closely with the Department of Community Engagement Department to receive student and family feedback. Staff input was collected via an inventory tool in the Fall of 2019. Student, family, PPS Staff, and community stakeholders’ input continues to be collected.

### **TIMELINE FOR IMPLEMENTATION / EVALUATION**

SB 52 went into effect on July 1, 2020. The Department of Student Success and Health has centralized staff who support continued implementation and evaluation strategies in relation to suicide prevention/intervention/postvention. This team is also available for consult.

In the 20-21 school year in response to this policy and other best practices, PPS is planning the following:

- Train all School Psychologists, Social Workers, Counselors, and QMHP's once a year on the policy, procedure, and best practices for intervening with students and/or staff at risk for suicide.
- Offer ASIST (Applied Suicide Intervention Skills and Training) opportunities 2x a year to the above-mentioned staff. This staff group should have an ASIST 2 day training every 5 years and refresher training every other year. \*\* Youth Save is a virtual option to replace ASIST training during CDL.
- Offer specific mental health training for 1 hour to school secretaries, nutrition services, community agents, community partners, and campus security.
- Teachers should receive up to 1 hour of general mental health/substance use training annually
- 
- Build a student advisory group which will include the continuous collection of student feedback

### **CONNECTION TO BOARD GOALS**

Board goals include a focus on building our organizational capacity, placing a focus on the professional learning of our educators, conditions in our classrooms and schools, partnerships with our families and community partners, and persistent attention to continuous improvement and accountability.

Suicide prevention and keeping students alive and mentally healthy will support reaching these goals. Our PPS Youth Risk Behavior Survey data indicates that our students continue to need this support.

### **STAFF RECOMMENDATION**

Staff recommends that the Board approve the policy.

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*As a member of the PPS Executive Leadership Team, I have reviewed this staff report.*

\_\_\_\_\_ (Initials)

ATTACHMENTS

- A. Student Suicide Prevention Policy 4.30.050-P
- B. Resolution to Adopt Student Suicide Prevention Policy 4.30.050-P

## **RESOLUTION No. 6225**

### Resolution to Approve the Student Suicide Prevention Policy 4.30.050

#### **RECITALS**

- A. In 2019, the Oregon legislature passed SB 52, also known as Adi's Act, requiring school districts to adopt a student suicide prevention policy. Adi's Act requires school districts to establish policies regarding student suicide prevention, intervention, and activities to reduce risk and promote healing after suicide.
- B. The Student Success Act also set forth new requirements for the development of statewide support for student suicide prevention through the development of a new statewide School Safety and Prevention System coordinated through the Oregon Department of Education's Office of Equity, Diversity, and Inclusion.
- C. In June 2020, the Board of Education Policy Committee considered the proposed policy. Before moving the policy to the full Board, the Committee asked staff to engage in stakeholder engagement for community and student input.
- D. On October 5, 2020, the Board of Education Policy Committee reviewed and approved the stakeholder and engagement plan developed by staff.
- E. On December 7, 2020, the Policy Committee reviewed the revisions to the policy and the engagement efforts and recommended that the policy be forwarded to the full Board for a vote.
- F. On December 15, 2020, the Board held a first reading of the proposed policy, and it was posted on the Board website for public comment. There has been no public comment on the proposed policy.

#### **RESOLUTION**

The Board of Education hereby approves the Student Suicide Prevention Policy 4.30.050-P.



# Student Suicide Prevention

Portland Public Schools recognizes that suicide is a leading cause of death among youth and that even more youth consider and attempt suicide. The possibility of suicide and suicidal ideation requires vigilant attention from all PPS staff. This policy is required by Oregon law, which was passed in 2019 in response to the advocacy of the family of a former PPS student, Adi Staub, who identified as transgender and died by suicide in 2017.

As a result, we must engage in best practices to provide school-wide suicide prevention and intervention strategies to minimize suicidal ideation and prevent attempts and deaths. We also must create safe and nurturing schools that increase connections and build strengths and self-worth in students. These efforts align with the PPS Racial Equity and Social Justice framework and center on BIPOC (Black, Indigenous, and People of Color) students and LGBTQIA+ (A common abbreviation for lesbian, gay, bisexual, pansexual, transgender, genderqueer, queer, intersexed, agender, questioning, and two-spirited), students living with mental and/or substance use disorders, who engage in self harm or have attempted suicide, living in out-of-home settings, experiencing houselessness, bereaved by suicide, and those with medical conditions or certain types of disabilities because these students are at higher risk for suicide. The emotional wellness of students greatly impacts school attendance and educational success. This policy is based on research and best practices in suicide prevention and has been adopted with the understanding that effective suicide prevention activities decrease suicide risk, increase help-seeking behavior, identify those at risk of suicide, and decrease suicidal behaviors.

### **District Plan for Suicide Prevention**

The District will collaborate with local and national experts to create and maintain a comprehensive approach to address suicide prevention, intervention, and postvention (a crisis intervention strategy designed to reduce the risk of suicide and suicide contagion, provide the support needed to help survivors cope with a suicide death, address the social stigma associated with suicide, and disseminate factual information on the suicide death of a member of the school community). The District will continually review, update, and implement the plan with consultation with subject-matter experts that may include state or national suicide prevention organizations, the Oregon Department of Education (ODE),



# Student Suicide Prevention

school-based mental health professionals, parents/guardians, employees, students, administrators, and school board associations.

### **The District plan shall include:**

#### **1. Training**

- A. All PPS staff will be trained on the risk factors and warning signs of suicidal risk and on the skills to connect students, families, and staff to resources in and out of the school building. Training materials must include self-review options.
- B. All school social workers, school counselors, and school psychologists, in addition to any other school staff designated by the building administrator, shall be responsible for responding to and implementing a suicide screening after a report of suicidal risk, and they shall receive enhanced training in procedures relating to suicide prevention, intervention, mental health systems navigation, and activities that reduce risk and promote healing after a suicide.
  - a. The enhanced professional development for designated staff will include training to identify, support, and respond to groups of students at elevated risk for suicide, including those living with mental and/or substance use disorders, those who engage in self harm or have attempted suicide, those in out-of-home settings, those experiencing houselessness, American Indian/Alaska Native students, LGBTQIA+ students, students bereaved by suicide, and those with medical conditions or certain types of disabilities.
  - b. All school social workers, school counselors, and school psychologists, in addition to other school staff designated by the building administrator, will be trained on processes for re-entry into a school environment following hospitalization or behavioral health crisis<sup>1</sup>.

The plan will require that District employees act at all times within the scope of their



**Student Suicide Prevention**

individual credentials and licenses and that they not deliver services or support when they do not have the credentials or license to do so.

**2. Youth Suicide/Mental Health Prevention Education for Students**

- A. All PPS students shall receive annually evidence-based, student-centered suicide prevention programming that is culturally and linguistically responsive and developmentally appropriate. The suicide prevention programming will include:
  - a. The importance of safe and healthy choices and coping strategies
  - b. How to recognize risk factors and warning signs of mental disorders and suicide in oneself and
  - c. Help-seeking strategies for oneself or others, including how to engage school resources and refer friends for help. In addition, schools may provide supplemental small group suicide prevention programming for students.
  - d. Opportunities for students to practice suicide prevention skills.

B. Suicide prevention materials and curriculum options must be reviewed annually by a multi-disciplinary group, consisting of administrators, parents, teachers, school-employed mental health professionals, representatives from community suicide prevention services, and other individuals with expertise in youth mental health, under the administration of a District prevention staff member.

These reviews should include data from surveys including but not limited to the National Youth Risk Behavior Survey and the PPS Successful Schools Survey.

**3. Requirement that Every School Has its Own Suicide Prevention Plan**



### Student Suicide Prevention

- A. School-based suicide prevention plans shall include but are not limited to the following components:
- One or more suicide-prevention point(s) of contact
  - Scheduled staff training on suicide prevention
  - Scheduled student health and wellness education, suicide prevention curriculum, and social emotional learning
  - Opportunities for students to feel seen, heard, and valued through the development of racial, cultural, and/or other identity groups
  - Defined school-based resources and referral processes to support students facing documentation status, housing and food insecurity, health care, and other concerns that increase suicide risk
  - System for tracking school-specific suicide screenings and referrals and
  - Training of school-specific staff members in postvention supports including contacting the Student Success and Health Department after a suicide death in your school program.

#### 4. Tracking and Accountability

- A. The District's Student Success and Health Department will:
- a. Be the office of record for suicide screenings and provide consultation
  - b. Organize the annual suicide prevention staff training
  - c. Identify and support the suicide prevention point of contact for each school program
  - d. Maintain an inventory of the suicide prevention curriculum/plan at each PPS school via the school-based suicide prevention point of contact
  - e. Provide crisis response and best practice postvention recovery supports for schools experiencing a suicide

#### 5. Notification and Family Engagement/Education

All students, families, employees, and contractors and volunteers who provide services to students will be notified annually of this policy, suicide prevention best practices for families, paths to an informal discussion of concerns about actions related to suicidal





## Board Policy

**4.30.050-P**

## Student Suicide Prevention

risk, as well as the process for review of actions taken in response to suicidal risk.

<sup>1</sup> "Behavioral health crisis" as defined by Oregon Administrative Rule (OAR) 581-022-2510, means a disruption in an individual's mental or emotional stability or functioning resulting in an urgent need for immediate treatment to prevent a serious deterioration in the individual's mental or physical health. R5/01/20 | PH Student Suicide Prevention\*\* – JHH <sup>1,2</sup>

END OF  
POLICY

Legal  
Reference(s):

ORS 332.107 ORS 339.343 OAR 581-022-2510

OSBA: JHH

**SCHOOLS,  
COVID-19 &  
SHARED  
UNDERSTANDINGS**



# PPS' DATA-INFORMED COVID-19 JOURNEY:

DR. RUSSELL BROWN  
PPS CHIEF OF SYSTEMS  
PERFORMANCE



# Guiding Principles for COVID Planning



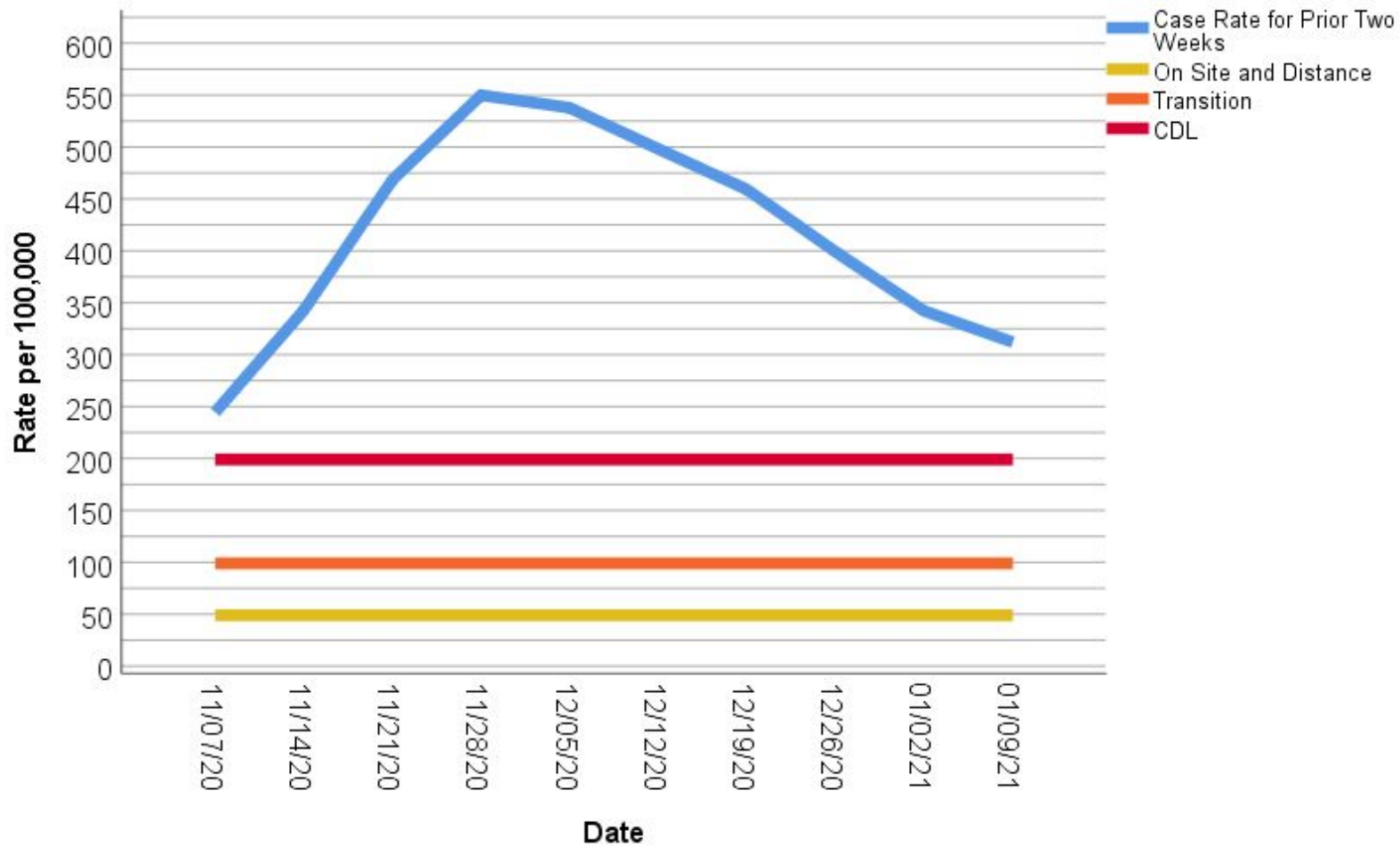
*System Shift: A Culture of  
Physical & Emotional Safety*

Ensure Health & Wellness  
for Staff, Students &  
Buildings

- Center Racial Equity and Social Justice
- Ensure the Health and Wellness of our staff and students
- Cultivate Connection and Relationship
- Strengthen and Innovate the Instructional Core



## Multnomah County Case Rate for Prior 2 Weeks





METRICS & MODELS	ON-SITE	ON-SITE AND DISTANCE LEARNING	TRANSITION	DISTANCE LEARNING
County Case Rate per 100,000 People Over 14 days	<50.0	50.0 to <100.0	100.0 to $\leq$ 200.0	>200.0

- As expected, our case remain high in comparison to October -
  - 10/18: 140 over 2 weeks
  - 01/09 312
- Test positivity has gone up to 6%



## Complex Path to Return

- Multiple perspectives regarding opening
- The constraints of our physical settings
  - 35 Square Feet per Student
  - Cohorting
  - Air quality
- Timing
  - Post-holiday wave
  - Vaccination timelines
- Negotiations





# PPS HEALTH ADVISORY PANEL



**DR. PETER GRAVEN, PHD**

**Affiliate Assistant Professor  
OHSU-PSU School of Public  
Health.**





# COVID Data Trends and Models

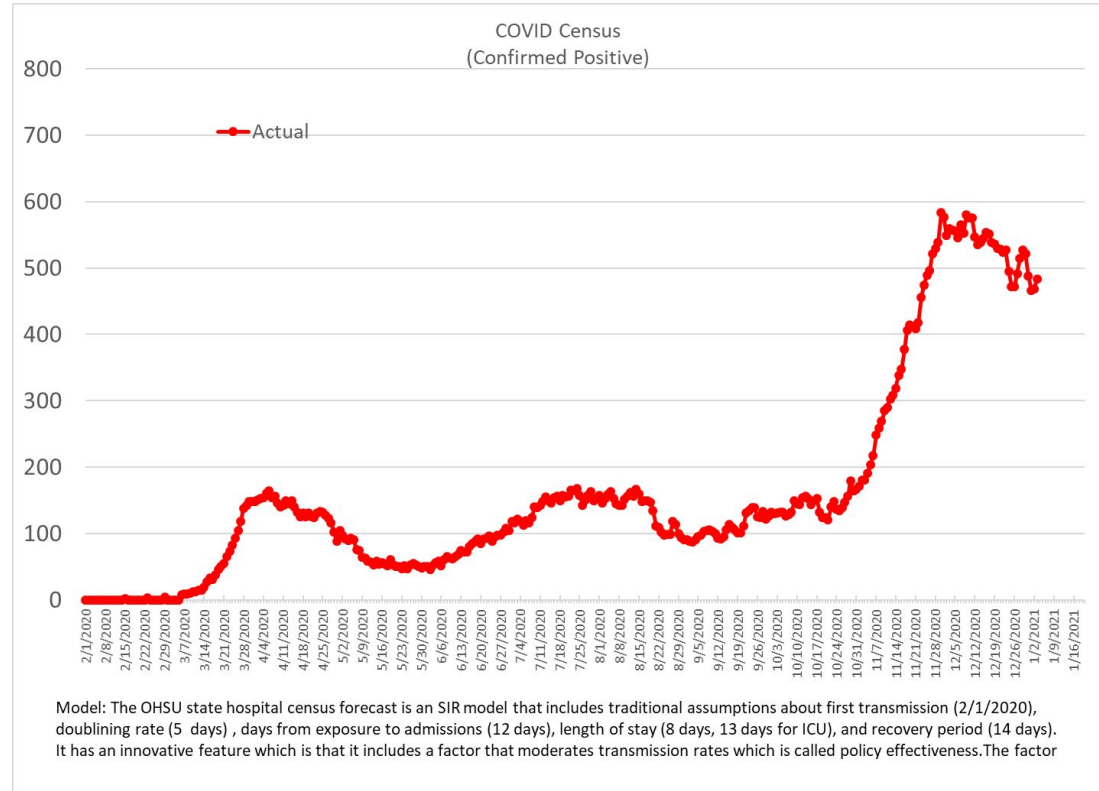
Edition: 1/12/2021

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Peter Graven, PhD; OHSU

# Hospitalized Patients

After peak of 584 on 11/30, census has only declined to 479 as of 1/4/2021.



Source:

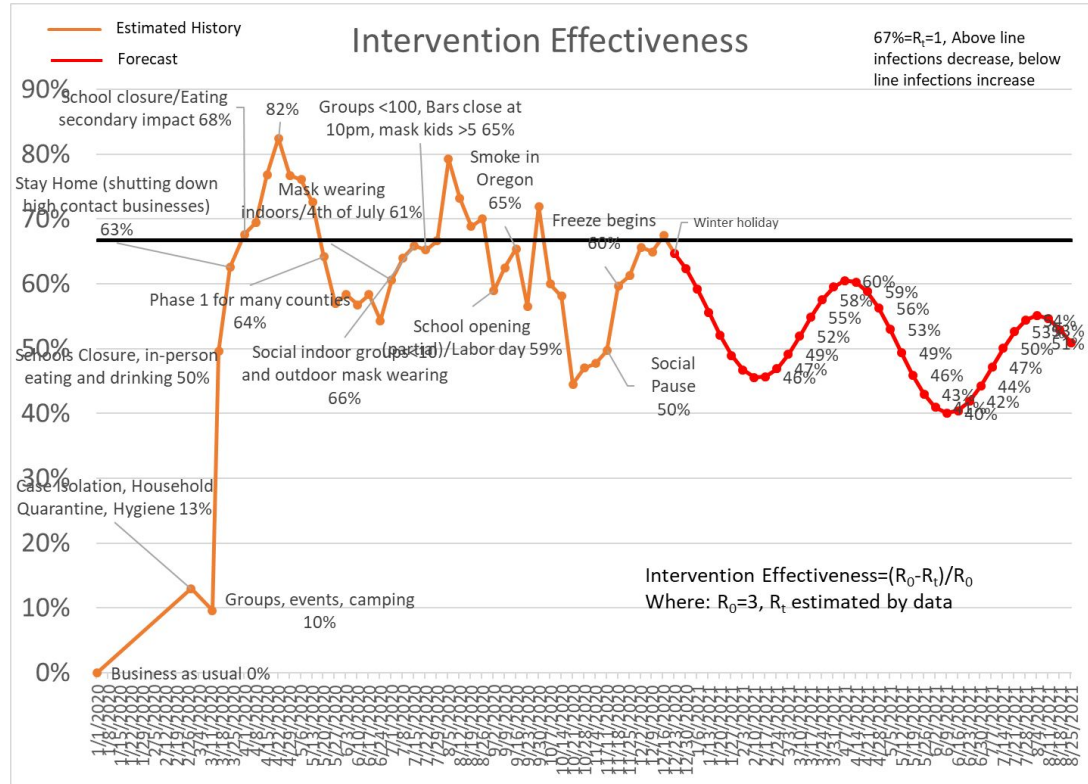
<https://public.tableau.com/profile/oregon.health.authority.covid.19#!/vizhome/OregonCOVID-19HospitalCapacitySummary>

Tables\_15065754787060/HospitalizationbySeveritySummaryTable

# Long Term Model-Intervention Schedule

The long term forecast shows the fear and fatigue cycles continuing.

It also includes a trend toward reduction in effectiveness over time.

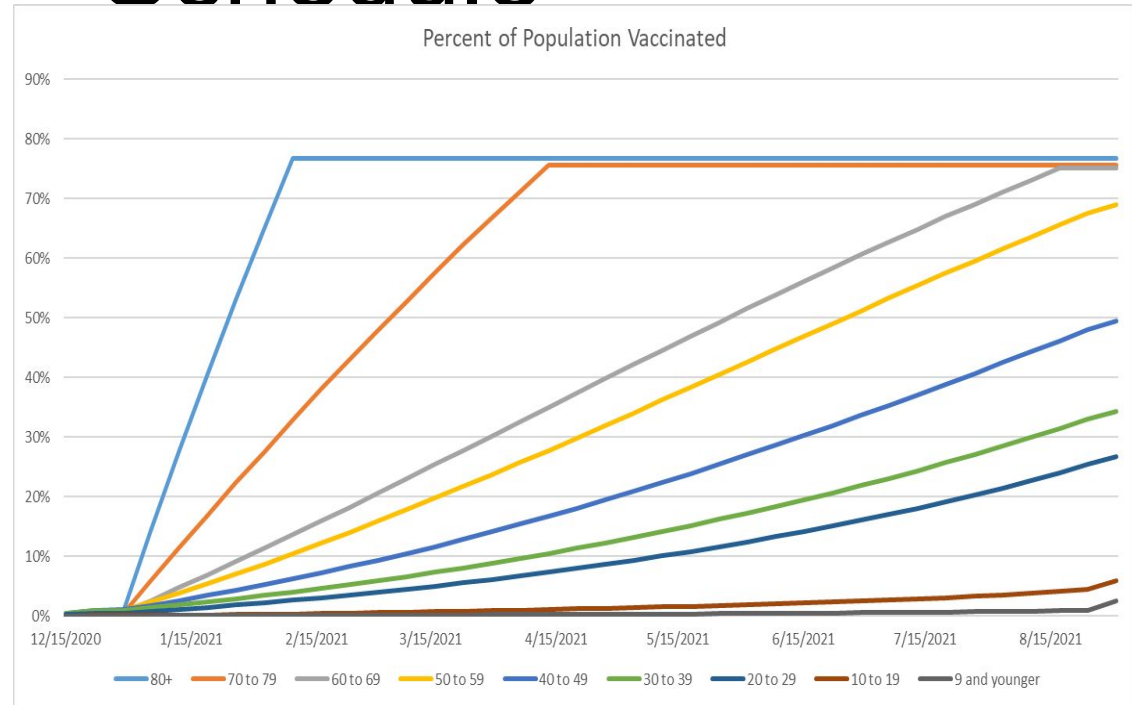


# Long Term Model-Vaccine Schedule

Schedule shows the percent of population vaccinated by date assuming 10k per week are possible.

Recent statement indicate the expectations should be 12k per day. So this may underestimate actuals.

The priority by age has not yet been observed as more workers are receiving the vaccine.

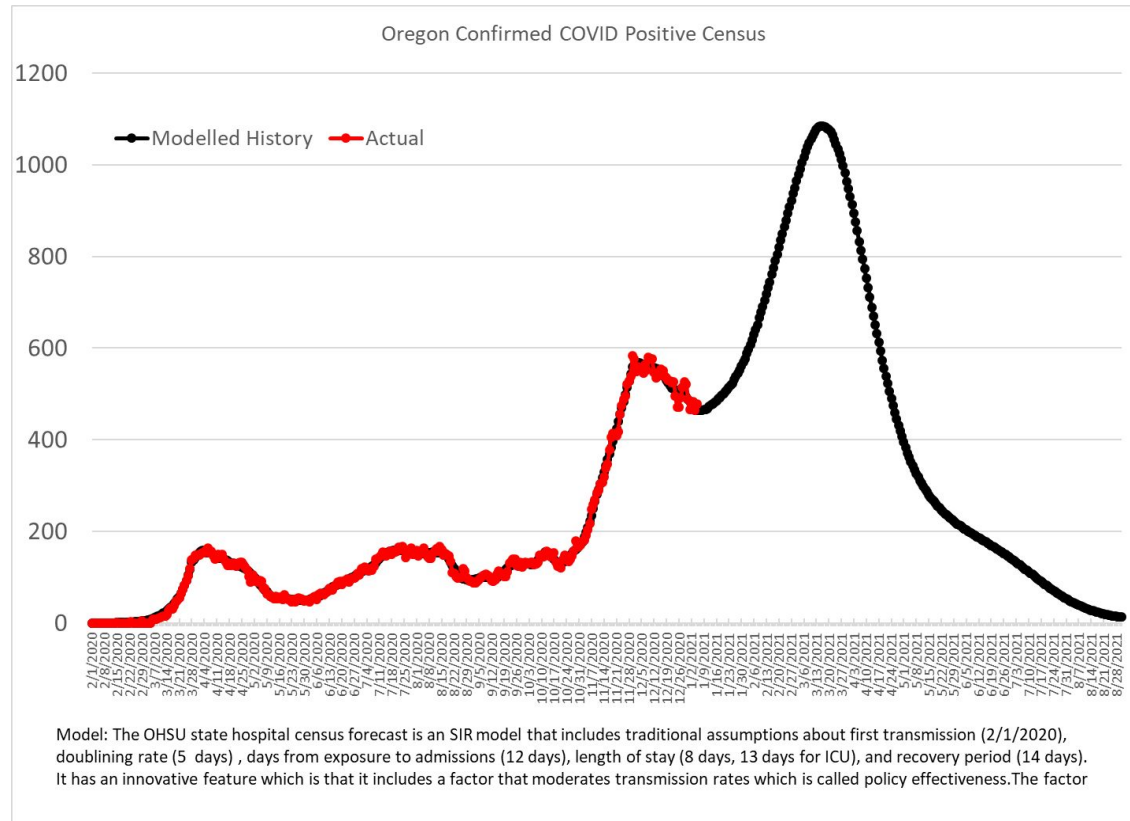


# Long Term Model-Census Forecast

Oregon is expected to have distinct second winter wave.

Impacts of vaccine bring to more manageable levels by April/May.

This does not include impact of Variant B.1.1.7 that is expected to increase transmissibility of COVID in Oregon.



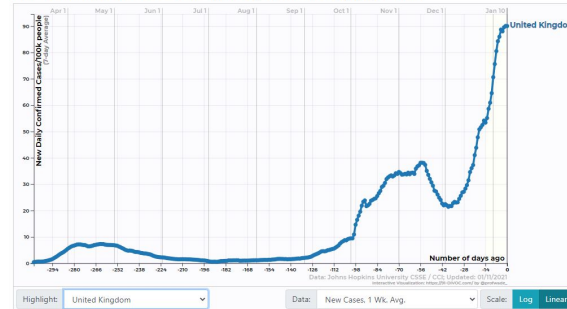
# B.1.1.7 Variant Driven Spikes

Countries with a large share of Variant (B.1.1.7) have experienced large winter surges.

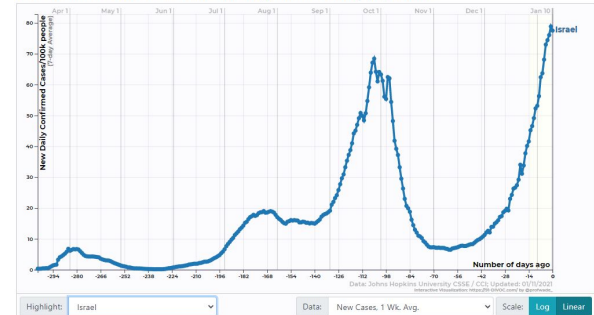
The charts show spikes in UK, Israel, Ireland and Portugal.

Germany has low rate of variant and has not had similar spike.

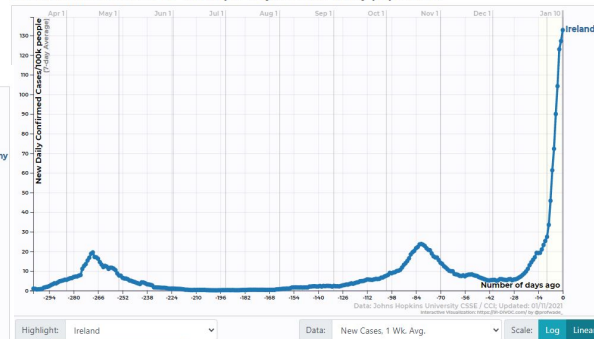
New Confirmed COVID-19 Cases per Day, normalized by population



New Confirmed COVID-19 Cases per Day, normalized by population



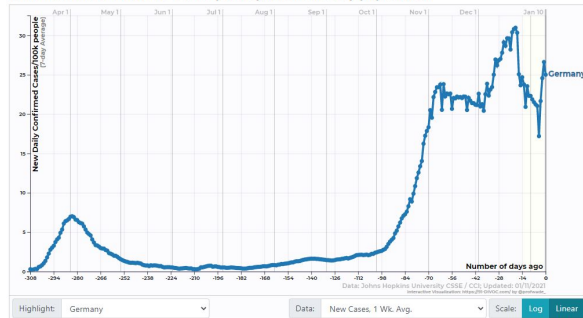
New Confirmed COVID-19 Cases per Day, normalized by population



New Confirmed COVID-19 Cases per Day, normalized by population



New Confirmed COVID-19 Cases per Day, normalized by population





# Long Term Model-Specs

## Assumptions

- 1) Vaccine schedule by week through 8/31/2021 (approx. 10k per day after start-up)
  - Project number replaced by actuals as they become known
- 2) Vaccine acceptance rate (75%)
- 3) Lagged affect on protection (2 weeks until vaccinated have protection)
- 4) Efficacy of vaccine (54% at first dose, 95% after second dose at 24 days)
- 5) Impact on hospitalization rate of new cases
  - Vaccine schedule prioritizes older individuals
- 6) Fear and Fatigue cycle of intervention effectiveness estimated with sinusoidal function (approx. 8 weeks/each)
- 7) Ascertainment rate- True infected are estimated to be 3.5 times larger than cases.
- 8) Vaccination of previously infected is possible based share of population infected.

# Long Term Model-Specs

## Limitations

- 1) There are a lot of assumptions for a model like this to work. Rather than it being an expectation of the future it is more of an exercise to see what our best guess is given information we have. The assumptions will change over time.
- 2) Additional dynamics that are not included (yet):
  - 1) Impact of B.1.1.7 variant on transmission rate or vaccine efficacy
  - 2) Whether vaccine only prevents symptoms or also prevents transmission
  - 3) Efficacy differences by age group
- 3) It has not been resolved why the effectiveness appears to be declining over time. It may be an artefact of how the parameter is calculated.



# Local Response: Multnomah County Health Department



**JESSICA GUERNSEY, DIRECTOR OF  
PUBLIC HEALTH**



Ann Loeffler, MD

**DR. ANN LOEFFLER, DEPUTY  
HEALTH OFFICER**



A stylized graphic on the left side of the slide. It features two dark green mountain peaks with white outlines, a dark green wavy band representing a forest or valley, and a dark blue wavy band at the bottom representing water. The graphic is positioned on the left side of the slide, partially overlapping the title area.

# PPS Schools Reopening: Updates

Presenters:

Jessica Guernsey, Public Health  
Director

Ann M. Loeffler, MD Deputy  
Health Officer

January 7, 2020

# Today's Briefing

- Vaccination Update
- Multnomah County role in schools reopening process



# Vaccine Goals

- Ensure safety and effectiveness
- Reduce transmission, morbidity, mortality
- Minimize disruption to society and the economy, including maintaining healthcare capacity
- Ensure equity



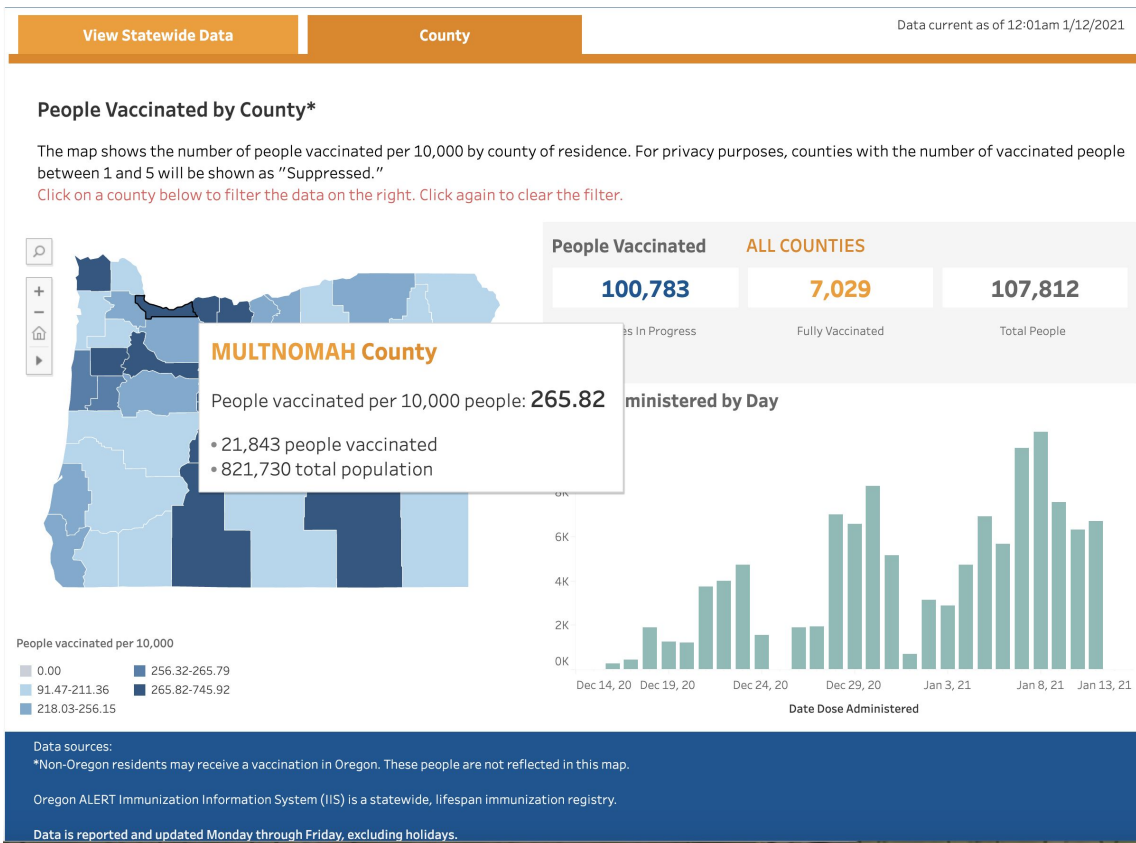
# Vaccine Priorities-Phase 1a

There are four groups in Phase 1 a:

- **Group 1:** Hospitals; urgent care; skilled nursing and memory care facility Health Care Providers (HCPs) and residents; tribal health programs; Emergency Medical Services (EMS) providers and other first responders.
- **Group 2:** Other Long Term Care Facilities (LTCFs) and congregate care sites including HCP and residents; hospice programs; mobile crisis care and related services; secure transport; individuals working in a correctional setting.
- **Group 3:** Outpatient settings serving specific high-risk groups; in home care; day treatment services; non-emergency medical transport (NEMT).
- **Group 4:** HCP in other outpatient, public health and early learning settings; death care workers.



# Multnomah County Vaccinations

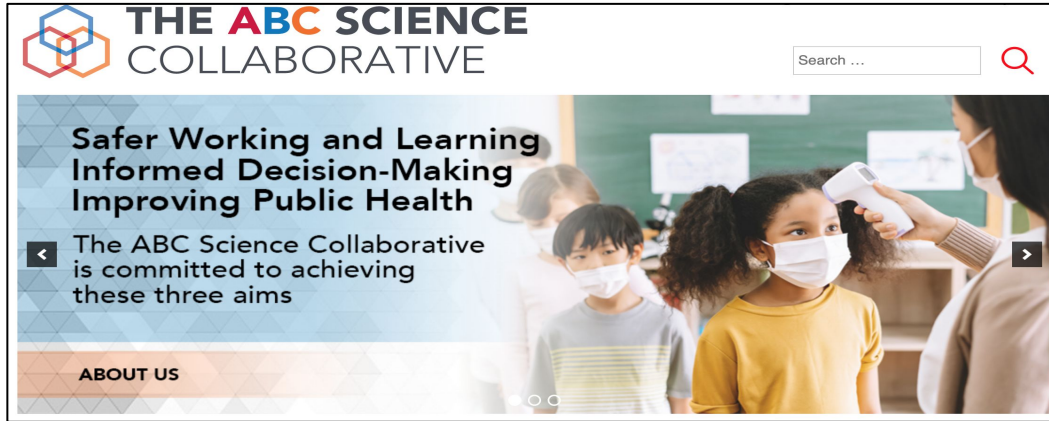


# Governor's Advisory Metrics


Category	Case rate/100,000 2 wk average	Test positivity rate	Advisory RSSL Instructional Model
Lower risk	<50	< 5%	<ul style="list-style-type: none"> <li>• On-site or hybrid</li> <li>• Cohorting &amp; mask wearing</li> </ul>
Moderate risk	50 to <100	5.0 to 8.0%	<ul style="list-style-type: none"> <li>• On-site or hybrid</li> <li>• suggest starting with elementary</li> <li>• HS and MS phased in with LIPI after success at primary grades</li> <li>• Cohorting &amp; mask wearing</li> </ul>
High risk	100 to < 200	8.0 to $\leq$ 10%	<ul style="list-style-type: none"> <li>• Plan for transition to CDL with LIPI</li> <li>• Cohorting &amp; mask wearing</li> </ul>
Extreme risk	$\geq$ 200	> 10%	<ul style="list-style-type: none"> <li>• CDL with LIPI</li> <li>• Cohorting &amp; mask wearing</li> </ul>





# Resources




**THE ABC SCIENCE COLLABORATIVE**

Search ... 

**Safer Working and Learning  
Informed Decision-Making  
Improving Public Health**

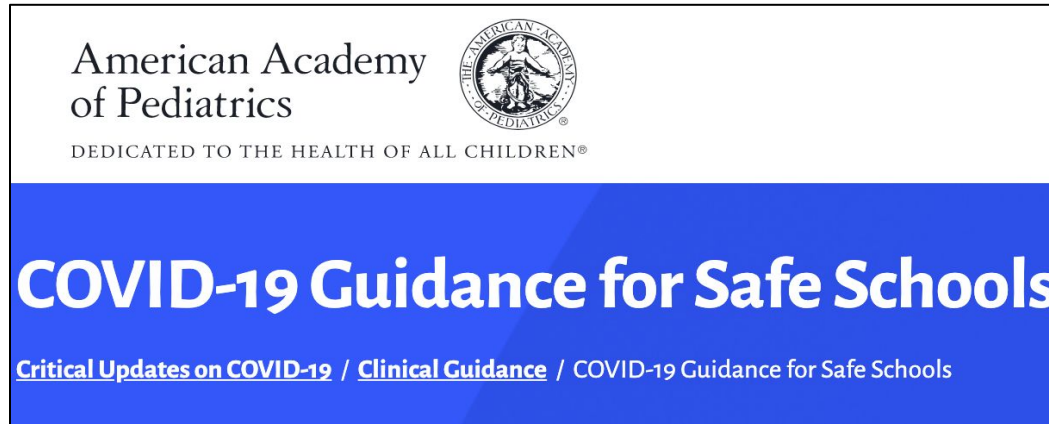
 The ABC Science Collaborative is committed to achieving these three aims 

**ABOUT US**




The screenshot shows the top section of a website. It features a logo for 'THE ABC SCIENCE COLLABORATIVE' on the left, a search bar with a magnifying glass icon on the right, and a main banner with a background image of children in a classroom wearing masks. The banner text highlights three aims: 'Safer Working and Learning', 'Informed Decision-Making', and 'Improving Public Health'. Below the banner is a navigation menu with 'ABOUT US' highlighted. At the bottom of the banner, there are three small circles, with the middle one being filled, indicating the current page position in a carousel.

Released 1/5/21



American Academy of Pediatrics



DEDICATED TO THE HEALTH OF ALL CHILDREN®

## COVID-19 Guidance for Safe Schools

[Critical Updates on COVID-19](#) / [Clinical Guidance](#) / [COVID-19 Guidance for Safe Schools](#)

The screenshot shows the header and main title of a webpage. It features the American Academy of Pediatrics logo and tagline 'DEDICATED TO THE HEALTH OF ALL CHILDREN®'. The main heading is 'COVID-19 Guidance for Safe Schools' in large white text on a blue background. Below the heading, there are three links: 'Critical Updates on COVID-19', 'Clinical Guidance', and 'COVID-19 Guidance for Safe Schools'.

Published their early experience last week





**Questions?**



# MULTIPLE PERSPECTIVES: COALITION OF COMMUNITIES OF COLOR



**MARCUS MUNDY, EXECUTIVE  
DIRECTOR**



Advancing racial justice through  
cross-cultural collective action

# Board Q & A





## Anti-Racist & Anti-Oppression Learning Communities

1/5/2021 Draft

### I. Purpose

Portland Public Schools is committed to an anti-racist and racial equity and social justice approach to public education to ensure a learning environment that is free from hate and the legacy of school segregation and institutional racism for all students and staff. The District unequivocally affirms that Black lives matter. We believe in the fundamental right to human dignity and that generating an equitable world requires an educational system that intentionally disrupts—and builds leaders to disrupt—systems of oppression.

We can begin the process of healing through our policies and curriculum to address cultural and institutional racism. The District must create an inclusive environment that reflects and supports the racial and ethnic diversity of our student population and community.

Every student is entitled to a high-quality educational experience, affirming and free from discrimination or harassment based on perceived race, color, ethnicity, religion, gender identity, sexual orientation, disability, or national origin.

Every employee is entitled to work in an environment that is affirming and free from discrimination or harassment based on perceived race, color, religion, gender identity, sexual orientation, disability, or national origin.

Every visitor is entitled to participate in an environment that is affirming and free from discrimination or harassment based on perceived race, color, religion, gender identity, sexual orientation, disability, or national origin.

### II. Definitions

1. “Bias incident” means a person’s hostile expression of animus toward another person, relating to the other person’s perceived race, color, ethnicity, religion, gender identity, sexual orientation, disability, or national origin of which criminal investigation or prosecution is impossible or inappropriate. Bias incidents may include derogatory language or behavior directed at or about any of the preceding demographic groups.

2. “Symbol of hate” means a symbol, image, or object that expresses animus on the basis of race, color, religion, gender identity, sexual orientation, disability, or national origin including, the noose, swastika, or confederate flag, and symbols contained in the [Hate on Display Hate Symbols Database](#), and whose display:

- a. Is reasonably likely to cause a substantial disruption of or material interference with school activities; or

b. Is reasonably likely to interfere with the rights of students to full access to the services, activities, and opportunities offered by a school or program; or

c. Is reasonably likely to create a hostile educational environment which interferes with the psychological and emotional well-being of a student.

3. "Hate Speech" means the written, verbal, visual or symbolic expression of animus on the basis of race, color, religion, gender identity, sexual orientation, disability, or national origin.

### III. Expectations and Consequences

**We will not tolerate in our schools, programs, activities, or on our property any symbols of hate that are disruptive to the learning environment; contain language, symbols, or images that are discriminatory; are recognized to promote hate or violent conduct; or contain threats. These include, but are not limited to, student and adult apparel, accessories, gestures, or other symbols such as those that depict symbols of hate. Exceptions will be made where symbols are used in teaching curriculum and other learning opportunities that are aligned to the Oregon State Standards and support the goals of this policy.** The District will incorporate learning opportunities to support the goals of this policy.

The District has adopted restorative justice practices in the belief that they help resolve conflicts and enable healthy, supportive, and inclusive communities. As part of this practice, the District will endeavor to address incidents of bias and hate speech using this approach.. Additionally, if this policy is violated by students, the District will assess whether disciplinary action is required under the Student Conduct and Discipline Policy [hyperlink] Adults who engage in hate speech or bias incidents may be subject to discipline and/or be prohibited from coming upon District property.

The District prohibits retaliation against any individual because that person has in good faith filed a charge, testified, assisted, or participated in an investigation, proceeding, or hearing; and further prohibits anyone from coercing, intimidating, threatening, or interfering with an individual for exercising any rights guaranteed under state and federal law.

Nothing in this policy is intended to interfere with the lawful use of District facilities pursuant to a lease or license.

END OF POLICY

In responding to the use of any symbols of hate, the District will follow the procedures outlined in the Anti-Racist Learning Communities Administrative Directive found [here](#).

A glossary of definitions of the types of behavior and beliefs that are instrumental in the development of bias incidents can be found here: [hyperlink to glossary]

Legal Reference(s):

[ORS 659.850](#); [ORS 659.852](#); [OAR 581-002-0005](#); [OAR 581-022-2312](#); [OAR 581-022-2370](#)

*Tinker v. Des Moines Indep. Cmty. Sch. Dist.*, 393 U.S. 503 (1969).

*Dariano v. Morgan Hill Unified Sch. Dist.*, 767 F.3d 764 (9th Cir. 2014).

*State v. Robertson*, 293 Or. 402 (1982).

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OSBA: **ACB**

Adopted: \_\_/21



## PORTLAND PUBLIC SCHOOLS OFFICE OF THE SUPERINTENDENT

501 North Dixon Street / Portland, OR 97227  
Telephone: (503) 916-3769

**Date:** January 5, 2021  
**To:** School Board  
**From:** Dani Ledezma, Sr. Advisor, RESJ  
**Subject:** Anti-Racist Learning Communities Policy

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### **BACKGROUND**

The proposed Anti-Racist Learning Communities policy provides additional guidance, clarity and prohibitions of hate speech and the use of hate symbols in educational settings. This policy is in response to the rule passed by the State Board of Education as well as in alignment with RESJ work at PPS.

In the fall of 2020, the State Board of Education passed the All Students Belong rule which prohibits the use of hate symbols in support of creating healthy and safe learning environments free from discrimination or harassment based on perceived race, color, religion, gender identity, sexual orientation, disability, or national origin, and without fear or hatred, racism or violence. The rule specifically prohibits the use of the swastika, the Confederate flag and the noose in any school-sponsored activity except where used in teaching curricula that are aligned with the Oregon State Standards.

### **RELATED POLICIES/BEST PRACTICES**

This proposed policy is modeled after the rule passed by the State Board of Education: [581-022-2312 All Students Belong](#). After passing the rule, the Oregon Department of Education issued [guidance](#) for all school districts including comprehensive resources for districts to aid in implementation. These resources complement the work PPS has done to [respond to hate speech](#). PPS' response has been informed by the following:

- Western State Center's [Confronting White Nationalism in Schools Tool Kit](#)
- Teaching Tolerance's [Responding to Hate and Bias at School](#)
- Anti-Defamation League's [Hate on Display Hate Symbols Database](#)
- Portlander's United Against Hate [Report Hate](#)

### **ANALYSIS OF SITUATION**

This proposed policy and accompanying Administrative Directive will strengthen prohibitions of the use of hate speech in alignment with districts across the state and with guidance from the Oregon Department of Education. These prohibitions and resulting consequences can be

aligned with the district's restorative justice approach and Student Conduct and Discipline policy.

### **FISCAL IMPACT**

Adoption and implementation of this policy will have minimum fiscal impact. Implementation and development of the Administrative Directive will codify existing protocols and provide additional support and resources for school sites and administrators.

### **COMMUNITY ENGAGEMENT (IF APPLICABLE)**

Staff engaged with student representatives in the drafting of the policy proposal and will continue to engage with students and culturally specific providers to refine and develop the administrative directive moving forward.

The State Board of Education received broad support from communities directly impacted by hate symbols who testified during the rule's passage that they looked forward to school district's adoption of supporting policies and implementation.

### **TIMELINE FOR IMPLEMENTATION / EVALUATION**

Upon approval from the Board of Education, staff will convene a cross departmental team to develop the accompanying Administrative Directive with hopes of adoption in early spring 2021.

### **CONNECTION TO BOARD GOALS**

This proposed policy recognizes that both a sense of belonging and a positive and affirming school environment is necessary for students to reach their academic and social potential. The proposed policy also recognizes the power of hate speech and symbols to inhibit health and safety. The proposed prohibitions of hate speech and symbols reinforces the district's attainment of the board goals by creating a positive and healthy learning culture conducive to student achievement with specific understanding of the impact on students of color and other impacted student populations.

### **STAFF RECOMMENDATION**

Given the rule adopted by the State Board of Higher Education and the resulting guidance from the Oregon Department of Education, staff recommend the adoption of this policy and resulting administrative directive to support this work.

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*As a member of the PPS Executive Leadership Team, I have reviewed this staff report.*

\_\_\_\_\_ (Initials)

#### **ATTACHMENTS**

- A. Draft Policy





**PORTLAND PUBLIC SCHOOLS**  
**OFFICE OF GENERAL COUNSEL**

501 North Dixon Street / Portland, OR 97227  
Telephone: (503) 916-3274

**Date:** January 5, 2021  
**To:** School Board  
**From:** Mary Kane, Senior Legal Counsel  
**Subject:** Professional Conduct Policy

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**BACKGROUND**

The Professional Conduct policy was approved by the Board in October 2019. The policy required all contractors with the District to take Professional Conduct training. Upon approval, a committee was convened to develop training protocols for contractors. The committee, composed of staff from, among others, Human Resources, Purchasing & Contracting, Office of Technology and Information Systems, Title IX, and Security Services, determined that the policy was too broad in including contractors with little to no contact with students because there was very little risk to students and a significant administrative and logistical burden of administering and tracking the training for those contractors.

The policy also defined expectations about staff-to-student text communication. With the introduction of Comprehensive Distance Learning in response to the Coronavirus pandemic, the District incorporated new communication platforms to allow additional methods of access to communicate with students. One such platform allows District oversight of text communication between students and staff.

The policy revisions proposed allow for more targeted training of contractors and more expansive access to students and staff using District-approved platforms.

**ANALYSIS OF SITUATION**

This policy is centered on student safety and the modifications requested by staff will not compromise this goal.

**FISCAL IMPACT**

There is no fiscal impact.

**COMMUNITY ENGAGEMENT (IF APPLICABLE)**

This Policy was brought before the Board Policy Committee at its January 2, 2021 meeting. The committee reviewed the recommended revisions and moved that it be put before the full board for a first reading.

A copy of the proposed changes to the policy was also provided to PAT in the fall of 2020, and at this time there has not been feedback received. Additionally, the Training Committee shared its recommendation for changes to the policy with Deputy Superintendent Clair Hertz for approval.

### **TIMELINE FOR IMPLEMENTATION / EVALUATION**

Once the Board approves the changes, the Training Committee will reconvene to finalize the training guidelines for contractors. This should be completed before the 2021-2022 school year. The communication platform is already in place.

### **BOARD OPTIONS WITH ANALYSIS**

1. Approval of the changes will provide for more accurate training requirements for contractors and will allow for greater support of students during Comprehensive Distance Learning.
2. Maintaining the policy will create capacity and compliance issues for training requirements and will negatively impact student support and outreach efforts during Comprehensive Distance Learning.

### **CONNECTION TO BOARD GOALS**

N/A

### **STAFF RECOMMENDATION**

Staff recommends approval of these modifications.

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*As a member of the PPS Executive Leadership Team, I have reviewed this staff report.*

\_\_\_\_\_ (Initials)

### **ATTACHMENTS**

- A. Policy



# Professional Conduct Between Adults and

### PURPOSE

District staff show extraordinary dedication and care in their daily work with students. A hallmark of this commitment is the development of strong relationships between adults and students. We believe that:

- A. Children are always learning about healthy relationships, and their most significant learning about relationships comes from how adults behave.
- B. Consistent relationship boundaries help children feel safe. Boundaries help them trust adults and help them know what is healthy behavior.
- C. Children need adults to be adults. Adults' behaviors set the conditions for healthy relationships.
- D. Adults are responsible for creating safe spaces.

The purpose of this policy is to establish common understanding and expectations for all adults in our District on setting consistent and safe boundaries with students. Those boundaries maintain the healthy relationships and safe spaces that students need to thrive.

### GENERAL STANDARDS & DEFINITIONS

- A. For purposes of this policy, **except as specifically noted**, "adults" include any and all District employees, coaches, substitutes, contracted service providers, and volunteers in their interactions with students in District schools and programs.
- B. "Student" means any person: (1) Who is: (a) In any grade from pre-kindergarten through grade 12; or (b) Twenty-one years of age or younger and receiving educational or related services from an education provider that is not a post-secondary institution of education; or (2) Who was previously known to the adult covered under this policy as a



### Professional Conduct Between Adults and

student and who left school or graduated from high school within 90 days of any alleged conduct violating this policy.

- C. For purposes of this policy, the term “legitimate educational purpose” includes matters or communications related to teaching, counseling, athletics, extracurricular activities, social-emotional support that serves the interest of the student, treatment of a student’s physical injury or other medical needs, school administration, or other purposes within the scope of the adult’s employment or other District-related duties.
- D. A “boundary violation” is behavior or interaction by an adult with a student that has no legitimate educational purpose and has the potential to cause harm to the student.
- E. All adults should maintain the highest professional and ethical standards when interacting with students. These standards are defined by the Oregon Teacher Standards and Practices Commission and by District policy.
- F. Volunteers play unique and important roles in students’ lives, and many also have relationships outside the school setting. **This policy applies to volunteers in the context of their volunteer commitment with the District.** The District expects volunteers to maintain appropriate conduct with students when they are engaged in District-authorized activities as outlined in this and other policies.

#### **GUIDELINES FOR INTERACTIONS BETWEEN ADULTS AND STUDENTS**

##### **A. General Guidelines and Required Training**

The interactions and relationships between adults and students should be based upon respect and trust, an understanding of the appropriate boundaries between adults and students in and outside of the educational setting, and consistency with the educational mission of our schools.

Adults may not intrude or appear to intrude on a student’s physical and



### Professional Conduct Between Adults and

emotional boundaries unless the purpose of the interaction is to serve a legitimate educational purpose.

Adults with direct, unsupervised contact with students are required to complete annual training provided by the District on sexual conduct prevention to provide guidance and establish appropriate professional boundaries for student-adult interactions.

We recognize that forming a relationship with students is an important aspect of teaching; however, adults should not engage in discussions with students when its purpose is to meet the adult's personal needs rather than the student's needs. If a student initiates a discussion about a significant personal or family problem, adults are encouraged to seek guidance from appropriate resources such as their principal or school counselors, as needed.

#### **B. Conduct Outside a School Setting**

Adults shall use good judgment in their relationships with students beyond their work responsibilities and/or outside the school setting. Informal and social involvements with individual students should be based on appropriate professional boundaries. Volunteers with community-based relationships with students are not subject to this provision in their relationships with those students in non-District settings. In addition to regular classroom instruction and extracurricular activities, staff members may also act in their professional capacity outside of the school day—for example, in providing before- and after-care, tutoring to improve students' academic skills, mentoring that provides students with positive role models, answering questions about school assignments, hosting school-sanctioned or school-sponsored activities and events. We recognize that adults will also encounter students out in our community in the normal course of their personal lives.

Even during non-school hours, when District employees and third-party contractors are acting in their professional capacity, they must maintain at all times ethical standards consistent with Teachers Standards and Practices



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Commission (TSPC) standards and District policies.

One-to-one tutoring and mentoring offered during school or non-school hours must take place at the school unless the principal or appropriate supervisor has received prior notification of an off-site location and written permission from the parent/guardian has been obtained. Unless otherwise approved by the principal or other District administrator, volunteers on District property must be under the supervision of a District staff member.

#### **C. Appropriate Personal and Community Relationships**

There may be circumstances where there is an appropriate personal relationship between staff and a student's family that exists independently of the staff member's position with the District (*e.g.*, when the families' children are friends). This policy is not intended to interfere with such relationships or to limit activities that are normally consistent with such relationships.

The District understands that adults may be involved in other roles in the community through civic, religious, family, athletic, scouting, private tutoring, or other organizations and programs whose participants may include District students. This policy is not intended to interfere with or restrict an adult's ability to serve in those roles; however, staff members are strongly encouraged to maintain professional boundaries appropriate to the nature of the activity with regard to all youth with whom they interact in the course of their community involvement.

#### **D. Appropriate Use of Email, Websites & Social Media**

The District allows and supports the use of technology to communicate transparently and for legitimate educational purposes. As with all forms of communication, adults are expected to maintain professional boundaries with students when communicating via electronic communications and social media.



# Professional Conduct Between Adults and

Staff or students may use approved educational websites if such sites are used solely for legitimate educational purposes.

### 1. Email Communication

All email communications from employees to students must be through a PPS-provided email address as described in the District's Acceptable Use Policy (8.60.40) and Social Media Administrative Directive 8.60.045-AD.

### 2. Social Media

District employees who wish to use social media as a tool to assist them in their professional duties must maintain separate accounts for professional and personal social media use and may follow or accept requests to connect from students only through their professional social media presence established consistent with the requirements set forth in the Social Media Administrative Directive 8.60.045-AD. Staff should have no expectation of privacy when communicating to students, including on a social media platform (*e.g.* Facebook, Twitter). Staff should not promise students absolute confidentiality in their communications.

### 3. Group Text Messages

The use of group text messaging has become a convenient tool for coaches and other staff working with students to relay information. District employees and third-party contractors shall use this method of communication only with both District approval and parental knowledge. Text messages to individual students through District-approved platforms shall contain only information with a legitimate educational purpose.



# Professional Conduct Between Adults and

### ***E. IN-PERSON INTERACTIONS***

#### **1. One-on-one meetings with students**

There will be times when adults are alone with students to discuss legitimate educational issues, including discipline or academic performance, for example. When possible, adults should meet one-on-one with students in a public space, such as libraries, open classrooms, or in places observable by others, such as offices or classrooms with windows and unlocked, ajar doors. When supporting students with sensitive issues, as is common for staff such as counselors and social workers, it is appropriate to provide a private setting. To maintain transparency, it is also good practice to let others know when and where meetings with a student will occur.

#### **2. Personal communication with students**

Connecting with students and building rapport is an important component to the staff-student relationship, and adults should promote healthy relationships with all students.

There are many times when a staff member's request for personal information is for a legitimate educational purpose. For example, personal reflection, relationships, or experiences are often part of a journaling exercise, and this policy is not intended to interfere with or impede this type of educational activity. It is appropriate for adults to check in with students about their well-being and/or whether they need any support with their school work. This policy does not prohibit that kind of healthy support of students.

If a student discloses information about the student's significant personal or family problems, adults are expected to seek guidance from appropriate resources such as their principal or school counselor, as needed.





### Professional Conduct Between Adults and

Adults are also expected to bring their concerns to their supervisor's attention when they have reason to believe a student is or may be becoming overly attached to or interested in them or other staff.

#### 3. Traveling with or transporting students

When transporting students to athletic events and other extracurricular activities, adults need to notify the District and the student's parent/guardian of the travel itinerary and may not transport students in a personal vehicle in a non-emergency situation without advance authorization by the District or as defined by the Coaches Handbook (<https://www.pilathletics.com/page/show/5161432-hs-coach-s-handbook>).

If an emergency situation arises that requires a staff member to transport a student without prior approval, the staff member shall alert a direct supervisor and the parent of the situation as soon as practicable.

When traveling out of town, staff must follow the procedure outlined in the Field Trips Administrative Directive (6.50.011-AD). Adults are prohibited from entering a student's hotel room without another adult present, except in an emergency.

#### 4. Physical contact with students

Adults should not initiate any physical contact without a legitimate educational purpose including offering public greetings, positive acknowledgments, or responding to a crisis. There are times when adults have a legitimate educational purpose to initiate physical contact with a student, and noninvasive contact, such as "high fives" or fist bumps to acknowledge a job well done are fine. In other instances, adults may be required to assist an injured student or a



### Professional Conduct Between Adults and

student with special needs who requires physical assistance. Likewise, adults may need to touch a student's arms or hands to redirect them in an activity. Coaches, music teachers, and other instructors may have a need for physical contact as a method of instruction. Adults need to be aware of what kinds of physical contact with which a student is and is not comfortable and limit physical contact to only that which is necessary for a legitimate purpose. Any physical redirection of students must be pursuant to the District's Physical Restraint and Seclusion Administrative Directive 4.50.060-AD.

#### 5. Respecting student privacy

Adults must honor a student's physical and emotional boundaries unless the interaction serves a legitimate educational purpose or is in response to an emergency.

Examples:

**Physical Surroundings:** Adults should not invade a student's privacy by entering a restroom, locker room, or other space where a student may not be fully clothed unless it falls within a staff member's regular job duties under an established written protocol, an emergency, or the staff needs to use the facility for a legitimate and intended purpose (*e.g.*, if it is not practical due to distance and time constraints to use a staff-only restroom).

**Personal Space:** Adults should respect a student's private space and be conscious of a student's cultural and personal boundaries when communicating (*e.g.*, adults should be conscious of standing too close to students when interacting with them).



# Professional Conduct Between Adults and

### 6. Exceptions

An emergency or a legitimate educational purpose may justify deviation from professional boundaries set out in this policy. Adults shall be prepared to articulate the reason for any exception from the requirements of this policy and must demonstrate that an appropriate relationship was maintained with the student at all times. Adults must ensure that any exception is narrowly tailored to the circumstances and must report it to their supervisor within 24 hours.

### **BOUNDARY VIOLATIONS**

A boundary violation is behavior or interaction by an adult in a position of power with a student that has no legitimate educational purpose, and has the potential to cause harm to the student.

#### **A. Examples of boundary violations/prohibited conduct**

Examples of conduct that violates professional adult/student boundaries in or outside of school hours include, but are not limited to, the following:

1. Any type of conduct, that would be considered sexual harassment under the District's Non-Discrimination/Anti-Harassment Policy (1.80.020-P);
2. Having any sexual conduct, including verbal or physical conduct or contact through written or electronic communications, with a student that is a sexual advance or request for a sexual favor or is of a sexual nature and is directed toward the student or that has the effect of unreasonably interfering with the student's educational performance, or of creating an intimidating, hostile, or offensive educational environment;



### Professional Conduct Between Adults and

- a. Examples of this behavior include, but are not limited to, the following:
  - 1) Engaging in a romantic or sexual relationship with a student;
  - 2) Dating, flirting with, or propositioning a student;
  - 3) Showing pornography to a student;
  - 4) Discussing, writing, texting, transmitting, and/or displaying material to students about sexual topics unrelated to curriculum or a legitimate educational purpose;
  - 5) Banter, allusions, jokes, or innuendos of a sexual nature with students;
  - 6) Patting buttocks or touching other intimate parts of a student;
  - 7) Permitting students to engage in behaviors with an adult that cross appropriate physical boundaries, *e.g.*, allowing students to give shoulder massages to the adult or allowing students to sit on an adult's lap;
  - 8) Singling out a particular student or students for favoritism, special privileges, or exchanging of gifts beyond the employee-student relationship;
  - 9) Disclosing intimate or sexual matters to a student, unless necessary to serve a legitimate educational purpose.
3. Bullying or other violations of the District's Anti-Harassment Policy 4.30.060-P.
4. Favoring a student when its purpose is to meet the adult's personal needs rather than the student's needs;
5. Inviting individual students to the adult's home without parental



### Professional Conduct Between Adults and

notice and approval unless otherwise noted in “Exceptions” section of the policy;

6. Being in the company of students who are consuming alcohol, drugs, or tobacco without intervening and reporting the conduct to appropriate personnel;
7. Sending or accompanying a student on personal errands or travel unrelated to any legitimate educational purpose;
8. Telling a student to keep something secret from other adults;
9. Addressing students or permitting students to address adults with personalized terms of endearment, pet names, or otherwise in an overly familiar manner that may cross appropriate professional boundaries;
10. Giving a student a ride alone in a vehicle in a non-emergency situation; except as permitted under this policy and Field Trips 6.50.011-AD;
11. Engaging in prohibited social media and electronic communications between adults and students as defined by the District’s Acceptable Use Policy (8.60.40) and Social Media Administrative Directive 8.60.045-AD.
  - a) Examples of this behavior include, but are not limited to, the following:
    - 1) District employees acting in their District capacity are prohibited from inappropriate online socializing with students, including phone calls, texting, skyping, instant messaging, or use of any other telecommunications method, or from engaging in any conduct that violates the law, District policies, or other generally recognized professional standards.



### Professional Conduct Between Adults and

- 2) Adults shall not communicate with students, for any reason, through use of a medium, blog, or app (software or phone application) that is designed to eliminate all traces or records of the communication (*e.g.*, Snapchat).
- 3) District employees and third-party contractors may not communicate with current students through social media directly or through private messaging tools without both written District approval and parental notice.

#### **DUTY TO REPORT POSSIBLE VIOLATIONS**

- A. Adults shall discuss with their building administrator or supervisor whenever they suspect or are unsure whether their conduct, or the conduct of other adults, is inappropriate or constitutes a violation of this policy. If the adult is dissatisfied with the response of the building administrator or supervisor, or does not feel comfortable discussing the situation with those individuals, they may bring it to the attention of the Chief of Human Resources. If the alleged behavior deals with harassment, intimidation, or bullying, the process in Policy 4.30.060-P should be followed. The District will investigate all complaints.

Any District employee who has reasonable cause to believe that another adult has engaged in sexual conduct as defined by Prohibition Against Employee Child Abuse and Sexual Conduct with Students 5.10.063-AD or sexual abuse as defined by statute shall immediately report this behavior to their school compliance officer and to the District Title IX Director. Additionally, any District employee or other mandatory reporter of abuse/neglect who has reasonable cause to believe that a child has been abused must promptly fulfill the mandatory reporting requirements to law enforcement and the Department of Human Services and report the allegation to their principal or supervisor.

District employees whose conduct violates this policy or who fail to



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report violations of this policy, may face discipline and/or termination, consistent with the District's policies and applicable collective bargaining agreements.

Violations of this policy by volunteers or contracted service providers may result in a prohibition from working or serving on District properties or with District students in school programs, or may result in contract cancellation. The District shall notify law enforcement of any potentially unlawful conduct, as appropriate.

#### B. Student/Parent and Guardian Reporting

Students and/or parents/guardians are strongly encouraged to notify the principal or other appropriate administrator if they believe an adult may be engaging in conduct that violates this policy.

#### **CONFIDENTIALITY AND NON-RETALIATION**

Staff members making a report of potential boundary violations or other prohibited conduct are specifically advised of the following:

1. They must directly notify a supervisor of the conduct;
2. They are required to maintain confidentiality; and
3. They are neither permitted to investigate nor responsible for investigating whether the conduct is inappropriate.

Confidentiality protects the student(s) as well as the adult who is the subject of the report. Failure to maintain confidentiality may impede the investigation and foster untrue and potentially harmful rumors. False reports are regarded as a serious offense and may result in disciplinary action or other appropriate sanctions.



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The District prohibits retaliation against anyone who makes a good-faith report under this policy. Any District employee who retaliates against any complainant, reporter, or other participant in an investigation may be subject to discipline, up to and including dismissal.

**TRAINING**

The Superintendent or his/her designee shall develop an annual training for all staff and ensure ongoing review of procedures to support this policy.

Adopted 10/15/2019; Amended 1/\_\_\_/2020

DRAFT





**Professional Conduct  
Between Adults and  
Students**

**PURPOSE**

District staff show extraordinary dedication and care in their daily work with students. A hallmark of this commitment is the development of strong relationships between adults and students. We believe that:

- A. Children are always learning about healthy relationships, and their most significant learning about relationships comes from how adults behave.
- B. Consistent relationship boundaries help children feel safe. Boundaries help them trust adults and help them know what is healthy behavior.
- C. Children need adults to be adults. Adults' behaviors set the conditions for healthy relationships.
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The purpose of this policy is to establish common understanding and expectations for all adults in our District on setting consistent and safe boundaries with students. Those boundaries maintain the healthy relationships and safe spaces that students need to thrive.

**GENERAL STANDARDS & DEFINITIONS**

- A. For purposes of this policy, **except as specifically noted**, "adults" include any and all District employees, coaches, substitutes, contracted service providers, and volunteers in their interactions with students in District schools and programs.
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Students**

student and who left school or graduated from high school within 90 days of any alleged conduct violating this policy.

- C. For purposes of this policy, the term “legitimate educational purpose” includes matters or communications related to teaching, counseling, athletics, extracurricular activities, social-emotional support that serves the interest of the student, treatment of a student’s physical injury or other medical needs, school administration, or other purposes within the scope of the adult’s employment or other District-related duties.
- D. A “boundary violation” is behavior or interaction by an adult with a student that has no legitimate educational purpose and has the potential to cause harm to the student.
- E. All adults should maintain the highest professional and ethical standards when interacting with students. These standards are defined by the Oregon Teacher Standards and Practices Commission and by District policy.
- F. Volunteers play unique and important roles in students’ lives, and many also have relationships outside the school setting. **This policy applies to volunteers in the context of their volunteer commitment with the District.** The District expects volunteers to maintain appropriate conduct with students when they are engaged in District-authorized activities as outlined in this and other policies.

**GUIDELINES FOR INTERACTIONS BETWEEN ADULTS AND STUDENTS**

**A. General Guidelines and Required Training**

The interactions and relationships between adults and students should be based upon respect and trust, an understanding of the appropriate boundaries between adults and students in and outside of the educational setting, and consistency with the educational mission of our schools. Adults may not intrude or appear to intrude on a student’s physical and



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emotional boundaries unless the purpose of the interaction is to serve a legitimate educational purpose.

Adults **with direct, unsupervised contact with students** are required to complete annual training provided by the District on sexual conduct prevention to provide guidance and establish appropriate professional boundaries for student-adult interactions.

We recognize that forming a relationship with students is an important aspect of teaching; however, adults should not engage in discussions with students when its purpose is to meet the adult's personal needs rather than the student's needs. If a student initiates a discussion about a significant personal or family problem, adults are encouraged to seek guidance from appropriate resources such as their principal or school counselors, as needed.

**B. Conduct Outside a School Setting**

Adults shall use good judgment in their relationships with students beyond their work responsibilities and/or outside the school setting. Informal and social involvements with individual students should be based on appropriate professional boundaries. Volunteers with community-based relationships with students are not subject to this provision in their relationships with those students in non-District settings. In addition to regular classroom instruction and extracurricular activities, staff members may also act in their professional capacity outside of the school day—for example, in providing before- and after-care, tutoring to improve students' academic skills, mentoring that provides students with positive role models, answering questions about school assignments, hosting school-sanctioned or school-sponsored activities and events. We recognize that adults will also encounter students out in our community in the normal course of their personal lives.

Even during non-school hours, when District employees and third-party contractors are acting in their professional capacity, they must maintain at all times ethical standards consistent with Teachers Standards and Practices



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Commission (TSPC) standards and District policies.

One-to-one tutoring and mentoring offered during school or non-school hours must take place at the school unless the principal or appropriate supervisor has received prior notification of an off-site location and written permission from the parent/guardian has been obtained. Unless otherwise approved by the principal or other District administrator, volunteers on District property must be under the supervision of a District staff member.

**C. Appropriate Personal and Community Relationships**

There may be circumstances where there is an appropriate personal relationship between staff and a student's family that exists independently of the staff member's position with the District (*e.g.*, when the families' children are friends). This policy is not intended to interfere with such relationships or to limit activities that are normally consistent with such relationships.

The District understands that adults may be involved in other roles in the community through civic, religious, family, athletic, scouting, private tutoring, or other organizations and programs whose participants may include District students. This policy is not intended to interfere with or restrict an adult's ability to serve in those roles; however, staff members are strongly encouraged to maintain professional boundaries appropriate to the nature of the activity with regard to all youth with whom they interact in the course of their community involvement.

**D. Appropriate Use of Email, Websites & Social Media**

The District allows and supports the use of technology to communicate transparently and for legitimate educational purposes. As with all forms of communication, adults are expected to maintain professional boundaries with students when communicating via electronic communications and social media.



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Staff or students may use approved educational websites if such sites are used solely for legitimate educational purposes.

**1. Email Communication**

All email communications from employees to students must be through a PPS-provided email address as described in the District's Acceptable Use Policy (8.60.40) and Social Media Administrative Directive 8.60.045-AD.

**2. Social Media**

District employees who wish to use social media as a tool to assist them in their professional duties must maintain separate accounts for professional and personal social media use and may follow or accept requests to connect from students only through their professional social media presence established consistent with the requirements set forth in the Social Media Administrative Directive 8.60.045-AD. Staff should have no expectation of privacy when communicating to students, including on a social media platform (*e.g.* Facebook, Twitter). Staff should not promise students absolute confidentiality in their communications.

**3. Group Text Messages**

The use of group text messaging has become a convenient tool for coaches and other staff working with students to relay information. District employees and third-party contractors shall use this method of communication only with both District approval and parental knowledge. Text messages to individual students **through District-approved platforms** shall contain only information with a legitimate educational purpose.



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***E. IN-PERSON INTERACTIONS***

**1. One-on-one meetings with students**

There will be times when adults are alone with students to discuss legitimate educational issues, including discipline or academic performance, for example. When possible, adults should meet one-on-one with students in a public space, such as libraries, open classrooms, or in places observable by others, such as offices or classrooms with windows and unlocked, ajar doors. When supporting students with sensitive issues, as is common for staff such as counselors and social workers, it is appropriate to provide a private setting. To maintain transparency, it is also good practice to let others know when and where meetings with a student will occur.

**2. Personal communication with students**

Connecting with students and building rapport is an important component to the staff-student relationship, and adults should promote healthy relationships with all students.

There are many times when a staff member's request for personal information is for a legitimate educational purpose. For example, personal reflection, relationships, or experiences are often part of a journaling exercise, and this policy is not intended to interfere with or impede this type of educational activity. It is appropriate for adults to check in with students about their well-being and/or whether they need any support with their school work. This policy does not prohibit that kind of healthy support of students.

If a student discloses information about the student's significant personal or family problems, adults are expected to seek guidance from appropriate resources such as their principal or school counselor, as needed.



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Adults are also expected to bring their concerns to their supervisor's attention when they have reason to believe a student is or may be becoming overly attached to or interested in them or other staff.

**3. Traveling with or transporting students**

When transporting students to athletic events and other extracurricular activities, adults need to notify the District and the student's parent/guardian of the travel itinerary and may not transport students in a personal vehicle in a non-emergency situation without advance authorization by the District or as defined by the Coaches Handbook (<https://www.pilathletics.com/page/show/5161432-hs-coach-s-handbook>).

If an emergency situation arises that requires a staff member to transport a student without prior approval, the staff member shall alert a direct supervisor and the parent of the situation as soon as practicable.

When traveling out of town, staff must follow the procedure outlined in the Field Trips Administrative Directive (6.50.011-AD). Adults are prohibited from entering a student's hotel room without another adult present, except in an emergency.

**4. Physical contact with students**

Adults should not initiate any physical contact without a legitimate educational purpose including offering public greetings, positive acknowledgments, or responding to a crisis. There are times when adults have a legitimate educational purpose to initiate physical contact with a student, and noninvasive contact, such as "high fives" or fist bumps to acknowledge a job well done are fine. In other instances, adults may be required to assist an injured student or a





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student with special needs who requires physical assistance. Likewise, adults may need to touch a student's arms or hands to redirect them in an activity. Coaches, music teachers, and other instructors may have a need for physical contact as a method of instruction. Adults need to be aware of what kinds of physical contact with which a student is and is not comfortable and limit physical contact to only that which is necessary for a legitimate purpose. Any physical redirection of students must be pursuant to the District's Physical Restraint and Seclusion Administrative Directive 4.50.060-AD.

**5. Respecting student privacy**

Adults must honor a student's physical and emotional boundaries unless the interaction serves a legitimate educational purpose or is in response to an emergency.

Examples:

**Physical Surroundings:** Adults should not invade a student's privacy by entering a restroom, locker room, or other space where a student may not be fully clothed unless it falls within a staff member's regular job duties under an established written protocol, an emergency, or the staff needs to use the facility for a legitimate and intended purpose (*e.g.*, if it is not practical due to distance and time constraints to use a staff-only restroom).

**Personal Space:** Adults should respect a student's private space and be conscious of a student's cultural and personal boundaries when communicating (*e.g.*, adults should be conscious of standing too close to students when interacting with them).





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**6. Exceptions**

An emergency or a legitimate educational purpose may justify deviation from professional boundaries set out in this policy. Adults shall be prepared to articulate the reason for any exception from the requirements of this policy and must demonstrate that an appropriate relationship was maintained with the student at all times. Adults must ensure that any exception is narrowly tailored to the circumstances and must report it to their supervisor within 24 hours.

**BOUNDARY VIOLATIONS**

A boundary violation is behavior or interaction by an adult in a position of power with a student that has no legitimate educational purpose, and has the potential to cause harm to the student.

**A. Examples of boundary violations/prohibited conduct**

Examples of conduct that violates professional adult/student boundaries in or outside of school hours include, but are not limited to, the following:

1. Any type of conduct, that would be considered sexual harassment under the District's Non-Discrimination/Anti-Harassment Policy (1.80.020-P);
2. Having any sexual conduct, including verbal or physical conduct or contact through written or electronic communications, with a student that is a sexual advance or request for a sexual favor or is of a sexual nature and is directed toward the student or that has the effect of unreasonably interfering with the student's educational performance, or of creating an intimidating, hostile, or offensive educational environment;



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- a. Examples of this behavior include, but are not limited to, the following:
- 1) Engaging in a romantic or sexual relationship with a student;
  - 2) Dating, flirting with, or propositioning a student;
  - 3) Showing pornography to a student;
  - 4) Discussing, writing, texting, transmitting, and/or displaying material to students about sexual topics unrelated to curriculum or a legitimate educational purpose;
  - 5) Banter, allusions, jokes, or innuendos of a sexual nature with students;
  - 6) Patting buttocks or touching other intimate parts of a student;
  - 7) Permitting students to engage in behaviors with an adult that cross appropriate physical boundaries, *e.g.*, allowing students to give shoulder massages to the adult or allowing students to sit on an adult's lap;
  - 8) Singling out a particular student or students for favoritism, special privileges, or exchanging of gifts beyond the employee-student relationship;
  - 9) Disclosing intimate or sexual matters to a student, unless necessary to serve a legitimate educational purpose.
3. Bullying or other violations of the District's Anti-Harassment Policy 4.30.060-P.
  4. Favoring a student when its purpose is to meet the adult's personal needs rather than the student's needs;
  5. Inviting individual students to the adult's home without parental



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notice and approval unless otherwise noted in “Exceptions” section of the policy;

6. Being in the company of students who are consuming alcohol, drugs, or tobacco without intervening and reporting the conduct to appropriate personnel;
7. Sending or accompanying a student on personal errands or travel unrelated to any legitimate educational purpose;
8. Telling a student to keep something secret from other adults;
9. Addressing students or permitting students to address adults with personalized terms of endearment, pet names, or otherwise in an overly familiar manner that may cross appropriate professional boundaries;
10. Giving a student a ride alone in a vehicle in a non-emergency situation; except as permitted under this policy and Field Trips 6.50.011-AD;
11. Engaging in prohibited social media and electronic communications between adults and students as defined by the District’s Acceptable Use Policy (8.60.40) and Social Media Administrative Directive 8.60.045-AD.
  - a) Examples of this behavior include, but are not limited to, the following:
    - 1) District employees acting in their District capacity are prohibited from inappropriate online socializing with students, including phone calls, texting, skyping, instant messaging, or use of any other telecommunications method, or from engaging in any conduct that violates the law, District policies, or other generally recognized professional standards.



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- 2) Adults shall not communicate with students, for any reason, through use of a medium, blog, or app (software or phone application) that is designed to eliminate all traces or records of the communication (*e.g.*, Snapchat).
- 3) District employees and third-party contractors may not communicate with current students through social media directly or through private messaging tools without both written District approval and parental notice.

**DUTY TO REPORT POSSIBLE VIOLATIONS**

- A. Adults shall discuss with their building administrator or supervisor whenever they suspect or are unsure whether their conduct, or the conduct of other adults, is inappropriate or constitutes a violation of this policy. If the adult is dissatisfied with the response of the building administrator or supervisor, or does not feel comfortable discussing the situation with those individuals, they may bring it to the attention of the Chief of Human Resources. If the alleged behavior deals with harassment, intimidation, or bullying, the process in Policy 4.30.060-P should be followed. The District will investigate all complaints.

Any District employee who has reasonable cause to believe that another adult has engaged in sexual conduct as defined by Prohibition Against Employee Child Abuse and Sexual Conduct with Students 5.10.063-AD or sexual abuse as defined by statute shall immediately report this behavior to their school compliance officer and to the District Title IX Director. Additionally, any District employee or other mandatory reporter of abuse/neglect who has reasonable cause to believe that a child has been abused must promptly fulfill the mandatory reporting requirements to law enforcement and the Department of Human Services and report the allegation to their principal or supervisor.

District employees whose conduct violates this policy or who fail to



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report violations of this policy, may face discipline and/or termination, consistent with the District's policies and applicable collective bargaining agreements.

Violations of this policy by volunteers or contracted service providers may result in a prohibition from working or serving on District properties or with District students in school programs, or may result in contract cancellation. The District shall notify law enforcement of any potentially unlawful conduct, as appropriate.

**B. Student/Parent and Guardian Reporting**

Students and/or parents/guardians are strongly encouraged to notify the principal or other appropriate administrator if they believe an adult may be engaging in conduct that violates this policy.

**CONFIDENTIALITY AND NON-RETALIATION**

Staff members making a report of potential boundary violations or other prohibited conduct are specifically advised of the following:

1. They must directly notify a supervisor of the conduct;
2. They are required to maintain confidentiality; and
3. They are neither permitted to investigate nor responsible for investigating whether the conduct is inappropriate.

Confidentiality protects the student(s) as well as the adult who is the subject of the report. Failure to maintain confidentiality may impede the investigation and foster untrue and potentially harmful rumors. False reports are regarded as a serious offense and may result in disciplinary action or other appropriate sanctions.



## **Board Policy**

**5.10.064  
-P**

### **Professional Conduct Between Adults and Students**

The District prohibits retaliation against anyone who makes a good-faith report under this policy. Any District employee who retaliates against any complainant, reporter, or other participant in an investigation may be subject to discipline, up to and including dismissal.

#### **TRAINING**

The Superintendent or his/her designee shall develop an annual training for all staff and ensure ongoing review of procedures to support this policy.

Adopted 10/15/2019; Amended 1/\_\_\_/2020

## RESOLUTION No. 6226

### Resolution to change Dr. Martin Luther King Jr. School identity and mascot name

#### RECITALS

- A. School names, identities, and mascots reinforce the culture and climate essential to build a sense of belonging for every Portland Public Schools student to achieve their fullest potential.
- B. In September 2019, the Board of Education voted to pass Board Resolution 5961 correcting the school name to Dr. Martin Luther King Jr. School, affirming the student and community advocacy regarding the school name and identity.
- C. In December 2018, Portland Public Schools initiated a process with the school community to determine a mascot that reflected a positive climate of the school.
- D. The Dr. Martin Luther King Jr. School Mascot Identification committee, whose membership included students, families, staff, PTA members, community members, and alumni commenced in December 2018 and met until February 2020. The Committee asked for suggestions from student classrooms, and their peers and developed in-class activities, and school community events to reflect on the school's identity.
- E. The charge of the Committee work was to query the community and put forth a recommended name to the Superintendent for his review and final recommendation to the Board of Education. The Committee recommended The Dream as their first choice to the Superintendent.
- F. Reverend Dr. Martin Luther King Jr. was an activist and leader in the Civil Rights Movement. During the March on Washington for Jobs and Freedom in August 1963, he delivered a speech referred to as the 'I Have a Dream Speech'. Dr. Martin Luther King Jr. was later assassinated in 1968, and the school identified its name following this moment in history. The Dream Dr. King Jr. referred to in his speech called for liberation, freedom, hope, leadership, and transformation, which are ideals the school community actively wishes to center on to represent themselves.
- G. The Superintendent, having reviewed the process and work of the Committee, recommends "The Dream" as Dr. Martin Luther King Jr. School's new mascot name to the Board of Education.

#### RESOLVED

NOW, THEREFORE, The Dr. Martin Luther King Jr. mascot and school identity will be known as the "The Dream". A brand-identity process will begin in 2021 winter term to provide visual elements to the mascot.

The Portland Public Schools Board of Education approves the Superintendent and school community's final recommendation of "The Dream".



**PORTLAND PUBLIC SCHOOLS**  
**OFFICE OF STRATEGIC PARTNERSHIPS & ENGAGEMENT**  
501 North Dixon Street / Portland, OR 97227  
Telephone: (503) 916-3962

**Date:** January 12, 2020

**To:** Superintendent Guadalupe Guerrero

**From:** Shanice Brittany Clarke, Director of Community Engagement

**CC:** Stephanie Soden-Back, Executive Chief of Staff  
Jonathan García, Chief Engagement Officer  
Dr. Shawn Bird, Chief of Schools  
Keeley Simpson, Regional Superintendent

**Subject:** Dr. Martin Luther King Jr. Elementary School: Mascot Naming Process

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### **BACKGROUND**

Prior to the establishment of Administrative Directive 2.20.011 in June 2016, the PPS Board of Education adopted Resolution #5313, responding to members of the King School community to re-establish their school name to Martin Luther King Jr. School, honoring the man for whom the school was named and who envisioned an excellent education for all children. In the process of renaming the school, parent-driven community engagement began in the school community to reclaim their school culture and identity. Since 2015, Principal Sage supported parents, students, and community members through these efforts. Principal Sage and a former Communications staff member supported a naming process that completed in January 2019, but was not approved or adopted by PPS. On September 10, 2019, the PPS Board of Education adopted Resolution #5961, permitting a correction of the current school name to be Dr. Martin Luther King Jr. Elementary School, where Principal Sage re-initiated a naming process with the newly hired Director of Community Engagement.

### **The D.R.E.A.M.**

Reverend Dr. Martin Luther King Jr. was an activist and leader in the Civil Rights Movement. During the March on Washington for Jobs and Freedom in August 1963, he delivered a speech referred to as the 'I Have a Dream Speech'. Dr. Martin Luther King Jr. was later assassinated in 1968, and the school identified its name following this moment in history. The Dream Dr. King referred to in his speech called for liberation, freedom, hope, leadership, and transformation, which are ideals the school community actively wishes to center on to represent themselves.

Currently, Dr. Martin Luther King Jr. Elementary School's official mascot is the Lions. Dr. MLK Jr. Elementary School seeks to formally officiate the mascot to 'The Dream', in effort to create an intentional and transformative brand for the school community.

Additionally, the school chooses not to personify their mascot, in an effort to avoid referring to the mascot as 'The Dreamers'.



**COMMUNITY ENGAGEMENT**

In accordance with Portland Public Schools (PPS) Board Policy 2.20.010-P “Naming School Property,” the Board of Education is responsible for the naming of all school district properties.

As an accompanied administrative directive, **2.20.011-AD** “Procedures for Naming School District Property” describes the procedure to consider renaming of school **”Naming and Renaming School facilities, focus options, programs, conversions, mergers, reconfigurations, mascots”**, which is a two-part processing warranting a board approved name from a community engagement process, to be followed by a replicated community engagement process for the visual brand identity will be presented to the Superintendent for approval.

Task from AD 2.20.011	PPS Action
<p>At the direction of the Superintendent, the Community Engagement Department will establish a timeline for the naming process and will work with the school principal to form a naming committee.</p> <p>The committee will be facilitated by a member of the Community Engagement Department and shall include the school principal and representatives from the school’s community including current students, staff (at least one teacher and one classified employee), community partners, alumni, and any other key stakeholders. The Community Engagement Department will work with the principal to determine how representatives are selected for the committee.</p> <p>The charge of the committee will be to solicit input from the greater school community and to make a recommendation to the Superintendent for consideration. This will be a two-part process, to first establish a name, followed by the development of brand identity elements. Both steps will follow the same process.</p>	<p>After the Community Engagement Department received approval, the Director of Community Engagement worked with Principal Sage in September 2019 to re-establish a refined naming process timeline and committee. The committee consisted of student stakeholder groups, teachers, community partners, parents, and one classified staff. Previous advocates following the initial name change in 2015 were nominated for the committee by the Principal, among other school stakeholders to include additional staff. The committee chose to honor the previous work with engaging students, families, parents, and community members.</p> <p>Engagement took place with families in Fall 2019, and families engaged community with students again in January 2020. The formats the committee utilized were through community-based organizations, parent meeting visits, newsletters, events, and student presentations.</p> <p>The naming process was grounded in the legacy of Dr. Martin Luther King Jr. The engagement facilitated a larger inquiry of support or opposition to titling the mascot, ‘The Dream.’ No opposition was found within the school community during engagement.</p>
<p>The committee, working with the Community</p>	<p>With the leadership of Principal Sage in</p>

<p>Engagement Department, will notify the staff, students, parents, and community groups of affected schools about the naming process. The committee will ensure a process for all interested parties to provide input. The committee will ensure that the name selected meets the criteria outlined in Board Policy 2.20.020-P. Consideration will be given to the historical background of the name to ensure that it is not associated with activities that are in conflict with the District's mission, goals, and policy of non-discrimination.</p>	<p>consultation with the Community Engagement Department, notification of the processes was delivered through newsletters, class visits, school group announcements, and events. The Dream of Dr. Martin Luther King Jr. may empower the sense of self for many students, and aligns with the District's vision to prepare students to lead a more socially just world.</p>
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**TIMELINE FOR IMPLEMENTATION / EVALUATION**

Dr. Martin Luther King Jr. Elementary School has already begun a cultural shift by using language with the D.R.E.A.M. (Determined, Respectful, Empathetic, Accepting, Making a Difference), and would be prepared to immediately adopt the mascot title.

**FISCAL IMPACT**

Fiscal impacts as a result of the mascot name change are the responsibility of the school, as outlined in AD 2.20.011.

**BOARD OPTION/STAFF RECOMMENDATION**

After a 5 year interactive naming process with Dr. Martin Luther King Jr. Elementary School community, the naming committee wishes to recommend changing the title of the mascot from the 'Lions', to "The Dream" to the Superintendent.

After approval, the second component of the process will initiate to develop brand identity elements, as outlined in AD 2.20.011.

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*As a member of the PPS Executive Leadership Team, I have reviewed this staff report.*

\_\_\_\_\_ (Initials)

**ATTACHMENTS**

- A. Dr. MLK Jr. School, Mascot Naming Process Packet

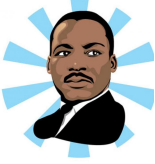



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# Dr. Martin Luther King Jr. Elementary School Mascot Identification Committee

MARCH 3, 2020

# Background and Proposal



The Martin Luther King Jr. Elementary School community has deep ties to the name of their school, and KGW also reported on the name being identified weeks

after the civil rights leader Dr. King was assassinated in 1968. The Oregon Department of Education initiated a change to shorten the name of in fall 2015, which resulted in some confusion in the greater community since the name serves as a legacy to many.

Students helped lead a process with various meetings and sessions meant to reclaim the name of the school, later joined by parents, staff, neighborhood groups, and community members. 'Dr. Martin Luther King Jr.' was confirmed as widely supported by Principal Sage in winter of 2018, and soon after, the former lead from Communications worked with the principal to support the process. In late 2018, a mascot naming process initiated with the same school community leaders, who came to identify their brand and mascot to be "The Dream". During a school event Dr. Martin Luther King Jr. Day in January 2019, the refreshed name was announced and celebrated.

## **Proposal/Recommendation**

After a 5 year interactive naming process with Dr. Martin Luther King Jr. Elementary School community, the school wishes to change its mascot from the 'Lions', to "The D.R.E.A.M."

## MASCOT COMMITTEE: A

NAMING PROCESS BEGAN IN 2015, PRIOR TO THE IMPLEMENTATION OF ADMINISTRATIVE DIRECTIVE 2.20.011. THE A.D. INDICATES THE COMMITTEE COMPOSITION SHALL INCLUDE STUDENTS, STAFF (AT LEAST 1 TEACHER AND 1 CLASSIFIED STAFF), COMMUNITY, ALUMNI, AND OTHERS.

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### Committee Members:

- Principal
  - Dr. MLK Jr. Students and Families
  - Community Members
  - Dr. MLK Jr. PTA Members
  - Current Dr. MLK Jr. Partners
  - SUN Site Manager/SEI Staff
  - Department of Community Engagement
- 

## NAMING COMMITTEE CHARGE:

THE CHARGE OF THE COMMITTEE WILL BE TO SOLICIT INPUT FROM THE GREATER SCHOOL COMMUNITY TO MAKE A RECOMMENDATION TO THE SUPERINTENDENT FOR CONSIDERATION. THIS WILL BE A TWO-PART PROCESS TO ESTABLISH A NAME - FOLLOWED BY THE DEVELOPMENT OF BRAND IDENTITY ELEMENTS (AD 2.20.011).

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**Principal:** Meeting and Process  
Co-facilitator

**Community Members:** Uplift historical background in connection with school and district.

**Department of Community Engagement:** Assist Principal in adhering to District Policy, Administrative Directive, and creating materials as necessary.

**All Committee Members:** Collaborate and participate as resources for the school community during the naming process.

## COMMUNITY ENGAGEMENT PLAN:

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- ✓ Solicit input from the greater school, with the advisement of the Department of Community Engagement
- ✓ Conduct feedback at parent and community group meetings
- ✓ Outreach to community partners
- ✓ School-based events
- ✓ School community newsletters
- ✓ Student presentations in classes
- ✓ Student in-class activities





**PORTLAND PUBLIC SCHOOLS**  
**OFFICE OF DEPUTY SUPERINTENDENT**  
501 North Dixon Street / Portland, OR 97227  
Telephone: (503) 916-3180

**Date:** January 5, 2021

**To:** School Board

**From:** Claire Hertz, Deputy Superintendent  
Esther Omogbehin, Regional Superintendent  
Dani Ledezma, Senior Advisor Racial Equity & Social Justice  
Judy Brennan, Director of Enrollment & Transfer  
Shanice Clarke, Director of Community Engagement

**Subject:** Southeast Enrollment and Program Balancing Phase One Recommendation

---

## **BACKGROUND**

In June of 2019, the Portland Public Schools (PPS) Board of Education adopted an ambitious vision, *PPS reimagined*, co-constructed by a broad coalition of students, staff and community stakeholders, that provides an aspirational North Star, core values, and direction to guide the transformation of our school system. While PPS engages in multi-pronged efforts to improve student outcomes through the implementation of academic strategies and social-emotional support for our students, the district also has several system issues related to the use of its physical facilities that impact student success. To address these issues, the Board of Education and the Superintendent launched an enrollment and program balancing process, contracting with FLO Analytics to lead data analysis and modeling, and co-develop community engagement strategies.

In February 2020 the Board adopted in Resolution 6059 a scope of work for a multi-phased process intended to address systemic issues of overcrowding, under-enrollment and program inequities. The first phase would begin with schools in the southeast quadrant of the district, due to a high number of small K-8 neighborhood schools and the imminent opening of Kellogg Middle School. Additional challenges in this area include overcrowding at Franklin High School and several schools housing imbalances of co-located language immersion and neighborhood programs.

Drawn from our community-created vision, Partnerships and Collaboration is a core value that shaped the overall design and roles for the Phase 1 process. In 2011, the Board voted to adopt the Racial Educational Equity Policy, 2.10.010-P, which links partnerships with stakeholders through district decision-making as a key strategy to eliminate the achievement gap between White students and students of color. Therefore, a Southeast Guiding Coalition (SEGC) comprised of parents, guardians, principals, students and teachers was established to create a recommendation for the Phase 1 process. The SEGC was set to convene in mid-March 2020, but stay-at-home orders delayed the start until September 10, and transitioned to a virtual



meeting platform. The Coalition met twelve times in Fall 2020, gaining shared understanding of district-wide enrollment and program data and racial equity and social justice tools before launching into an iterative review of more than a dozen boundary change and program relocation scenarios. The insight and foresight the Southeast Guiding Coalition provided through Phase 1 has helped strengthen a multi-year process to resolve complex enrollment issues that impact students. The SEGC considered feedback from hundreds of community stakeholders gathered through surveys, focus groups and individual submissions and hosted a virtual open house attended by more than 800 community members. The pandemic's impact on the process goals illustrated multiple perspectives regarding each aspect of the recommendation. The SEGC recommendation was developed with the experiences learned from stakeholders,

On December 17, the SEGC submitted their recommendation for Kellogg Middle School feeder schools and programs. The plan assigns grades 6, 7 and 8 of the Arleta, Lent and Marysville neighborhoods to Kellogg, along with the same grades of Spanish Immersion programs currently located at Bridger K-8, Lent K-8 and Mt. Tabor Middle School.

The coalition will reconvene with an expanded membership in February 2021 to address additional enrollment and program balancing needs in southeast schools, including the conversion of Harrison Park K-8 to a comprehensive middle school beginning in August 2022.

## **RELATED POLICIES/BEST PRACTICES**

[4.10.045-P Student Assignment to Neighborhood Schools](#)

[4.10.049-AD Student Assignment Review and School Boundary Changes](#)

## **ANALYSIS OF SITUATION**

The outcome goals set out in the Board's enrollment and program balancing scope of work include:

- Optimize the use of facilities to enhance PK-12 learning environments for all students. PPS wants to be a good steward of public assets and phase out portable classrooms when possible to create connected, safer schools.
- Support equitable programming to improve the student experience across all grade levels, and particularly in middle grades. This process will support continued educational program redesign at the middle grade levels, to include reconfiguration of identified K-8 neighborhood schools to K-5 elementary schools and creating new comprehensive middle schools while maintaining some regional K-8 school options to support pathway continuity (e.g., Dual Language Immersion).
- Minimize program co-locations to reduce isolation and program inequities by creating fewer shared facilities and co-located programs at K-5, K-8, and 6-8 schools.

The SEGC's recommendation achieves these goals by converting three of six SE neighborhood K-8s to K-5 feeder schools, creating a feeder pattern for Kellogg and consolidating middle grade Spanish Immersion programs from three locations to one. As described below, PPS staff will engage community members from the remaining three SE K-8 neighborhood schools, Bridger, Creston and Harrison Park, to address immediate needs for the 2021-22 school year and long-term changes beginning in 2022.

The estimated demographic make-up of the Kellogg student population is shown below.



	Race & Ethnicity									Percent English Language Learners	
	Asian	Asian-White	Black	Latino	Native American	Multi-racial	Pacific Islander	White	Percent Free Meals		Percent Special Education
Kellogg MS	12.8%	2.6%	5.8%	39.0%	1.1%	6.5%	1.6%	30.6%	30.4%	16.9%	10.5%

Demographic, enrollment and building utilization estimates for Kellogg and feeder schools are available on page five of the SEGC’s Phase I recommendation. Based on the estimated rate of students eligible for free meals through direct certification, it is likely that Kellogg will qualify for Title I services next year.

The recommendation preserves a portion of Kellogg’s capacity to absorb additional students likely to enroll next year, but who are not currently attending PPS schools. This “new school effect” has been observed at other modernized or converted schools and is discussed further in the attached analysis.

**FISCAL IMPACT**

The SE Enrollment and Program Balancing process will be completed in two phases beginning in Fall 2020 for implementation in 2021-22 and Phase 2 continuing in Spring 2021 for implementation in 2022-23.

Phase 1 implementation will include the opening of Kellogg Middle School and relieving the overcrowding of Bridger Elementary allowing the return of kindergarten students to the main campus. Staffing allocations will be adjusted based on the number of students enrolled in each school. There will be some additional staffing costs for opening a new school including administrative, counseling and custodial staff for Kellogg and some savings from closing the Bridger Kindergarten annex.

In addition, PPS is prepared to support schools converting from K-8s to K-5s in Phase 1 that may need boundary shifts to balance enrollment in Phase 2. The staffing model for 2021-22 will make sure students receive a similar number of electives including PE, Library, and Arts (Art, Music, Theater, Dance) offerings as K-5 students currently experience at their K-8 schools.

**COMMUNITY ENGAGEMENT**

Using a model provided by FLO Analytics, PPS established a community stakeholder group to consider enrollment and program changes, gather and consider feedback from the broader community, and provide a recommendation to the Deputy Superintendent. The Phase I SE Guiding Coalition was composed of 42 parents, guardians, students, teachers and principals representing 18 southeast schools.

In response to the Coalition’s inquiries about the lived experiences of PPS families, including historically underserved communities, online surveys were released in 6 languages and garnered more than 1,200 responses. To enact on our commitment to partnerships and collaboration, particularly with Black, Native, and people of color, roughly 200 students from Phase 1 schools were surveyed, and focus groups were held for additional feedback. Over 500

members of the PPS community participated in targeted opportunities facilitated in Russian, Vietnamese, Chinese, Somali, Spanish, and English for Black, Indigenous, and People of Color.

Additionally, 293 phone surveys of middle grade families were conducted and more than 500 letters and comments were submitted to the enrollment and program balancing website. All input was shared with the SEGC and posted on the Enrollment and Program Balancing [webpage](#).

Throughout the fall, PPS families received regular updates in the district's six supported languages on the SEGC process via email and through the district's social media sites. Messages and open house invitations were also available in the six languages, and interpreters were present at the November 17 open house and available for all coalition meetings. Given the impact of the pandemic on student and family participation, additional engagement opportunities will contribute to additional representation in future phases of the process.

### **TIMELINE FOR IMPLEMENTATION / EVALUATION**

The Board of Education is scheduled to adopt a recommendation for Kellogg and feeder schools and programs on January 26, 2021. This decision will trigger updates to enrollment forecasts that will be used in the upcoming budgeting and staffing procedures. A Kellogg principal will be named in the coming weeks, and tasked with reaching out to feeder school communities to begin transition planning in preparation for the school opening next August.

Enrollment in the Kellogg attendance area and Spanish Immersion program will begin in the 2021-22 school year as follows:

- Students enrolled at the end of this school year in grades 5, 6 and 7 at Arleta, Lent and Marysville K-8 schools will be assigned to Kellogg Middle School beginning next school year. These students will have the right to remain at Kellogg through 8th grade.
  - This includes 67 students who live in other neighborhoods but have approved transfers into Arleta, Lent and Marysville schools.
- Students enrolled at the end of this school year in grades 5, 6, and 7 of the Bridger and Lent Spanish Immersion programs will be assigned to Kellogg Middle School beginning next school year.
- Students enrolled at the end of this school year in grade 5 of the Atkinson Spanish Immersion program will be assigned to Kellogg Middle School beginning next school year.
- Students enrolled at the end of this school year in grades 6 and 7 of the Mt. Tabor Spanish Immersion program will be assigned to Kellogg Middle School beginning next school year.
- All students assigned to Kellogg MS or residing in the Arleta, Lent and Marysville attendance areas retain rights to request transfers to other schools, per PPS policies. Final placements of students in the Arleta focus classroom will be reviewed by the Special Education department to ensure students receive a Fair and Appropriate Public Education.

Should the Board of Education approve this recommendation, staff will work with the remaining SE K-8 neighborhood school communities at Bridger, Creston and Harrison Park, to plan for the best possible middle school experiences for students next year.

The next round of SEGC work will commence in February 2021 to address additional enrollment and program balancing issues, including:

- Boundary changes for K-5, middle and high schools
- Additional language immersion program consolidations and relocations, where appropriate
- Designating space for Pre-K and Special Education continuums

The coalition's composition will be expanded to include additional SE schools who were not part of the fall process, as well as include more members of color.

### **BOARD OPTIONS WITH ANALYSIS**

The January 12, 2021 Board meeting will be an opportunity for the Board to ask questions, get clarifications, and suggest improvements to the SEGC recommendation. The Board will vote to approve the Phase 1 recommendation at the January 26, 2021 Board meeting.

### **CONNECTION TO BOARD GOALS**

The SEGC Enrollment and Program Balancing has followed the charge outlined in Resolution 6059 for a multi-phased process intended to address systemic issues of overcrowding, under-enrollment and program inequities.

### **STAFF RECOMMENDATION**

Accept SEGC recommendation as submitted.

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*As a member of the PPS Executive Leadership Team, I have reviewed this staff report.*

\_\_\_\_\_ CH\_\_\_\_\_ (Initials)

### **ATTACHMENTS**

- A. SEGC Phase 1 Recommendation
- B. Open house and focus group feedback summary
- C. New school effect analysis
- D. Kellogg capacity
- E. Kellogg feeder pattern map
- F. Resolution 6059 and Scope of Work

## **RESOLUTION No. 6059**

### **Enrollment and Program Balancing Process Scope of Work**

#### **RECITALS**

- A. In June of 2019, the Portland Public Schools (PPS) Board of Education adopted an ambitious vision, *PPS reimagined*, co-constructed by a broad coalition of students, staff and community stakeholders, that provides an aspirational North Star and direction to guide the transformation of our school system.
- B. While PPS engages in multi-pronged efforts to improve student outcomes through the implementation of academic strategies and social-emotional support for our students, the district also has several system issues related to the use of its physical facilities that impact student success. To address these issues, the Board of Education and the Superintendent will launch an enrollment and program balancing process.
- C. The Enrollment and Program Balancing Scope of Work provides overarching guidance for the project, including district-wide rationale, core values, outcome goals, and approach and sequence of work.
- D. The PPS Board of Directors reviewed and suggested revisions to scope of work drafts during work sessions on February 4 and February 18.

#### **RESOLUTION**

The Board of Directors accepts the Enrollment and Program Balancing Process Scope of Work, and directs the Superintendent to begin the first phase of the process.

# **Enrollment and Program Balancing Process**

## **Proposed Scope of Work**

### **February 25, 2020**

#### **Introduction**

In June of 2019, the Portland Public Schools (PPS) Board of Education adopted an ambitious vision, *PPS reimagined*, co-constructed by a broad coalition of students, staff and community stakeholders, that provides an aspirational North Star and direction to guide the transformation of our school system. While PPS engages in multi-pronged efforts to improve student outcomes through the implementation of academic strategies and social-emotional support for our students, the district also has several system issues related to the use of its physical facilities that impact student success. To address these issues, the Board of Education and the Superintendent will launch an enrollment and program balancing process.

Staff will develop short and long-term recommendations, with input from the community, for enrollment and program balancing in Portland Public Schools based on identified outcome goals (see below) and to support the access of historically underserved students to high quality learning environments. Enrollment and program balancing work will commence in spring 2020, beginning with southeast schools. The process will continue to the north/northeast areas to address over- and under-enrolled schools in the second year. In the third year, the process will continue in the west/southwest to address over enrollment of several schools. As defined in Board policy, proposals and recommendations will be considered by the Board on an annual basis with the intention that all changes be approved no later than January of the calendar year for the following school year.

#### **Why are we doing this?**

Enrollment and program imbalances across the district create inequities that impact student learning:

- Some of our school sites are either over- or under-enrolled:
  - Over-enrolled schools often don't have enough classroom space for optimal class sizes, PE, or multiple electives
  - Under-enrolled schools often have difficulty providing a robust array of programming; students and educators in single-strand program pathways are isolated from their peers

- Having programs co-located in a building often leads to isolation and programmatic inequities
- The ACCESS program was relocated and divided into two separate campuses and needs to be reunited and resituated.
- A new middle school is opening in 2021; we need to identify its feeder pattern and engage the school communities that may be potentially reconfigured from K-8's to K-5's, as well as prepare for the opening of an additional middle school in Southeast. Grade reconfigurations may also be needed in other areas.
- Some high school student enrollment counts are unbalanced, and could affect equitable course offerings and student opportunities
- A continuum of special education services does not currently exist within all regional clusters based on the specific needs of students on IEPs for special focus classrooms, and related supports.

Because we are inefficiently using facilities, we are addressing these problems by using scarce resources that would otherwise be available for direct student services.

### **Why now?**

Enrollment imbalances have been recognized as problematic in PPS for many years, with multiple community processes over the last decade. While some adjustments were accomplished, problem areas still exist. The immediate impetus for re-starting this work is the opening of Kellogg Middle School in August 2021. In order to have a smooth transition for students, families, and educators, we will need to determine Kellogg's feeder pattern by January 2021. More broadly, we are committed to addressing the problems identified above to better serve our students.

### **Core Values**

This process is grounded in our core values--ethical principles established in the development of our community-informed vision for the future of PPS:

- |                                    |                                      |
|------------------------------------|--------------------------------------|
| ● Students at the Center           | ● Creativity and Innovation          |
| ● Racial Equity and Social Justice | ● Partnerships and Collaboration     |
| ● Honesty and Integrity            | ● Grounded in the Spirit of Portland |
| ● Excellence                       | ● Joyful Learning and Leadership     |
| ● Respect                          |                                      |
| ● Relationships                    |                                      |

## **Outcome Goals**

The District's enrollment and program balancing goals to optimize student learning are:

- **Optimize the Use of Facilities** to enhance PK-12 learning environments for all students. PPS wants to be a good steward of public assets and phase out portable classrooms when possible to create connected, safer schools.
- **Support Equitable Programming** to improve the student experience across all grade levels, and particularly in middle grades. This process will support continued educational program redesign at the middle grade levels, to include reconfiguration of identified K-8 neighborhood schools to K-5 elementary schools and creating new comprehensive middle schools while maintaining regional K-8 school options to support program pathway continuity (for example, Dual Language Immersion pathways).
- **Minimize Program Co-Locations** to reduce isolation and program inequities by creating fewer shared facilities and co-located programs at K-5, K-8, and 6-8 schools.

## **Approach and Sequence of Work**

1. **Comprehensive Analysis & Development of a Phased District-Wide Enrollment Balancing Plan** - In order to maintain equitable and fiscally sustainable schools, school districts should have a process in place that allows timely adjustments to population shifts on a regular basis. Since PPS has not had such a mechanism for many years, numerous imbalances have accumulated across the district. Data show that students' ability to thrive is challenged when there are schools across the district experiencing enrollment and program imbalances. Strategies that emerge to address these imbalances in PPS will be informed by a robust data analysis inclusive of multiple data sources. PPS will be transparent about the sources of data, as well as our analysis and utilization of the Restorative Equity and Social Justice (RESJ) lens to inform decision making. The analysis will consider student demographics race/ethnicity, social economic status, special education, and English language learners. PPS also aspires to provide opportunities to enhance data literacy within our community in order to build our collective capacity and develop a shared analysis.
2. **Phased Implementation Plan Using Regional Approach/Focus** - While the master plan will use a district-wide perspective, its implementation will occur in phases over the next several years. PPS recognizes the unique neighborhood and geographic contexts in which our students live and our schools and

programs are located. Since understanding and responding to local conditions requires some intensive work, our phased approach will address identified problem areas, while being mindful of the larger district context. Staff will begin with resolving multiple issues in the Southeast region. The most immediate task is identifying the schools that will feed into the new Kellogg Middle School that will be opening in August 2021. At the same time, we will need to prepare for opening a second middle school in the region within the next few years and resolving severe overcrowding at Bridger. As the district-wide plan identifies other regions experiencing imbalances, additional phased work will be added.

- 3. Community Engagement** – As PPS staff generate recommendations for changes to bring to the School Board, we will engage the broader community in structured ways to both inform the community of the reasons why we are doing enrollment balancing, and to take advantage of the knowledge and experience of students, parents, and other community members in developing equitable solutions. Staff will seek input through advisory groups of school principals, parents, students and community, through broad outreach using open houses and surveys, as well as targeted engagement with students and historically underserved parents and community members. Community engagement will take place within the context of PPS Core Values, with an emphasis on racial equity. We are committed to sharing enrollment and related data with the public, and asking for input on scenarios generated by staff and for help in developing alternative scenarios that may lead to better, more equitable schools for our students. Final recommendations should recognize the multiple perspectives held by community members and clearly explain why some ideas were incorporated and some were not. The PPS Board will make the final decisions in the enrollment balancing process.
- 4. Continuous Improvement** - As a learning organization, PPS is committed to processes that reinforce learning cycles. We intend to use a phased approach, learning from initial findings and strategies and making adjustments as the work progresses. This approach allows us to resolve problems as quickly as possible for maximum positive student impact.



# Enrollment and Program Balancing Process

## Proposed Scope of Work

~~Third Draft to Board~~

~~February 19, 2020~~ February 25, 2020

### **Introduction**

In June of 2019, the Portland Public Schools (PPS) Board of Education adopted an ambitious vision, *PPS reImagined*, co-constructed by a broad coalition of students, staff and community stakeholders, that provides an aspirational North Star and direction to guide the transformation of our school system. While PPS engages in multi-pronged efforts to improve student outcomes through the implementation of academic strategies and social-emotional support for our students, the district also has several system issues related to the use of its physical facilities that impact student success. To address these issues, the Board of Education and the Superintendent will launch an enrollment and program balancing process.

-Staff will develop short and long-term recommendations, with input from the community, for enrollment and program balancing in Portland Public Schools based on identified outcome goals (see below) and to support the access of historically underserved students to high quality learning environments. Enrollment and program balancing work will commence in spring 2020, beginning with southeast schools. The process will continue to the north/northeast areas to address over- and under-enrolled schools in the second year. In the third year, the process will continue in the west/southwest to address over enrollment of several schools. As defined in Board policy, proposals and recommendations will be considered by the Board on an annual basis with the intention that all changes be approved no later than January of the calendar year for the following school year.

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- Some of our school sites are either over- or under-enrolled:
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- Under-enrolled schools often have difficulty providing a robust array of programming; students and educators in single-strand program pathways are isolated from their peers
- Having programs co-located in a building often leads to isolation and programmatic inequities
- The ACCESS program was relocated and divided into two separate campuses and needs to be reunited and resituated.
- A new middle school is opening in 2021; we need to identify its feeder pattern and engage the school communities that may be potentially reconfigured from K-8's to K-5's, ~~as well as prepare for the opening of an additional middle school in Southeast.~~, as well as prepare for the opening of an additional middle school in Southeast. ~~Grade reconfigurations may also be needed in other areas.~~ Grade reconfigurations may also be needed in other areas.
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- Racial Equity and Social Justice
- Honesty and Integrity
- Excellence
- Respect
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- Partnerships and Collaboration
- Grounded in the Spirit of Portland
- Joyful Learning and Leadership

### **Outcome Goals**

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analysis and utilization of the Restorative Equity and Social Justice (RESJ) lens to inform decision making. The analysis will consider student demographics race/ethnicity, social economic status, special education, and English language learners. PPS also aspires to provide opportunities to enhance data literacy within our community in order to build our collective capacity and develop a shared analysis.

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4. **Continuous Improvement** - As a learning organization, PPS is committed to processes that reinforce learning cycles. We intend to use a phased approach, learning from initial findings and strategies and making adjustments as the work progresses. This approach allows us to resolve problems as quickly as possible for maximum positive student impact.

Subject: Enrollment forecasting for new and modernized schools

To: Claire Hertz, Deputy Superintendent, Business and Operations

From: Judy Brennan, Director, Enrollment and Transfer  
 Charles Rynerson, Demographer, PSU Population Research Center  
 Shawn Helm, Principal Analyst, System Planning & Performance

Date: January 4, 2020

Since 2016 PPS has experienced increased enrollment at several modernized and reconfigured schools. This report examines the “new school effect” at six schools, in order to prepare for re-opening Kellogg Middle School and Madison High School in August 2021.

Actual and forecasted enrollment at six schools were analyzed using the one-year forecasts delivered during the school year prior to re-opening. For new middle schools, the forecasts were prepared after the PPS Board of Education approved feeder patterns and other implementation plans.

**Table 1: Forecast and actual enrollment at recently modernized, converted and re-opened schools**

School	Type	Year	Forecast Enrollment	Actual Enrollment	Difference
<b>Faubion K-8</b>	modernization	2017	507	626	23% 119 students
<b>Franklin HS</b>	modernization	2017	1677	1745	4% 68 students
<b>Grant HS</b>	modernization	2019	1740	1813	4% 73 students
<b>Harriet Tubman MS</b>	Re-opened MS	2018	446	491	10% 45 students
<b>Ockley Green MS</b>	K-8 to MS conversion	2016	518	546	5% 28 students
<b>Roseway Heights MS</b>	K-8 to MS conversion	2018	571	588	3% 17 students

The Portland State University Population Research Center has provided annual enrollment forecasts for PPS for more than twenty years ([pps.net/Page/1834](http://pps.net/Page/1834)). One-year district-level forecasts have been within 1% of actual enrollment for each of the past ten years, meaning a net difference of fewer than 500 students across all schools. However, enrollment is usually higher or

lower than expected at the individual school level. Higher than expected enrollment may result in disruptive staffing and scheduling changes after the start of the year, which has proved particularly challenging at new middle schools in recent years.

This brief report, based on an analysis conducted by the PSU Population Research Center, focuses on three essential elements of individual school enrollment forecasts:

- The number of students residing in the school attendance zone
- The proportion of resident students attending the neighborhood school
- The number of students who reside in other neighborhoods but attend this school, including students enrolled in special programs located at the school

Table 2 shows the difference between forecast and actual enrollment for each of these components. There is notable complexity even within this small set of factors. For example, the Grant High School resident forecast includes students who live in the base attendance zone, as well as those residing in the Jefferson/Grant dual assignment area. Additionally, the Grant non-resident forecast includes students with guaranteed transfer rights through ACCESS Academy and Japanese Immersion and those who remained at Grant after a boundary change with Madison began in 2019.

**Table 2: Enrollment difference factors**

School	Forecast resident students	Actual resident students	Difference*	Forecast resident students attending	Actual resident students attending	Difference*	Forecast non-resident students	Actual non-resident students	Non-resident difference	Total difference
<b>Faubion K-8</b>	641	726	54	64% 410	70% 509	45	97	117	20	119
<b>Grant HS</b>	1919	2002	83	72% 1391	75% 1492	29	349	321	-28	73
<b>Franklin HS</b>	2174	2194	14	68% 1480	70% 1533	39	197	212	15	68
<b>Harriet Tubman MS</b>	717	699	-7	48% 342	53% 368	33	104	123	19	45
<b>Ockley Green MS</b>	673	668	-3	55% 368	60% 399	34	150	147	-3	28
<b>Roseway Heights MS</b>	821	809	-7	62% 508	65% 529	28	63	59	-4	17

\*The portion of enrollment difference that is attributed to a specific factor, as calculated by the PSU Population Research Center. The largest attributable factor for each school is highlighted.

In all cases, the rate of resident students attending the neighborhood school was higher than predicted. Additionally, at Faubion and Grant the number of resident students increased significantly, which was the primary reason for higher enrollment at these schools.

The “new school effect” varied across the six schools reviewed, but the pattern of increased enrollment by neighborhood students, as well as the likelihood of higher numbers of resident students, are probable at future new and modernized schools. This has implications for Madison High School and Kellogg Middle School, both opening in August 2021.

The latest enrollment forecasts prepared in Spring 2020 did not include Kellogg Middle School, because the assignment area and programs had not been determined. Additionally, increases in neighborhood PPS student populations or neighborhood school shares due to the opening of Kellogg MS were not factored into Franklin cluster K-8 schools. Enrollment forecasts for Kellogg MS and related schools will be prepared in Spring 2021, based on the board decision, and will be informed by this analysis.

In the meantime, the district staffing team could conduct additional analysis of “new school effect” staffing implications and consider non-formula adjustments for new schools to proactively address the potential for higher enrollment next year.



**Subject:** Kellogg Capacity One Sheet  
**To:** Claire Hertz, Deputy Superintendent  
**From:** Dana White, Director Planning & Real Estate  
**Date:** 2021 - 01 - 04

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## KELLOGG MS STUDENT CAPACITY

The purpose of this memo is to outline both the physical and functional capacity calculations as we apply these metrics to schools, in this case specifically our new Kellogg Middle School. It is of critical importance to note the difference as it relates to the viability of providing appropriate educational and support services to our students.

The basis for the following capacity calculation is the size and number of classrooms<sup>1</sup>. Classrooms between 500 - 800 square feet are assigned 24 students; classrooms between 800 - 1000 square feet are assigned 27 students; classrooms above 1000 square feet are assigned 30 students. See table 1 for a distribution summary of the classrooms at Kellogg MS. These numbers include 25 general classrooms, six science classrooms, one art classroom, and one music classroom, as well as one gym, noted separately below.

TABLE 1 - SUMMARY OF KELLOGG MS CLASSROOMS

CLASSROOMS					
Small	Medium	Large	Modulars	Gyms	Total Rooms
0	25	8	0	1	34

Given the student station allocations described above, the gross capacity of Kellogg is 945 students. In essence this would mean every room is utilized at maximum capacity every hour of every day which while physically possible is not functional. In the District's utilization model, gross capacity is further refined based on targeted reductions for special education classrooms (among others) and broadly reduced based on a utilization factor - in the case of Kellogg and other modernized middle and high schools, 85%. Utilization factors are applied to broadly account for underutilized classrooms during one or more periods per day, often due to scheduling issues, as well as space for community partners, restorative justice, and other important initiatives. In sum, middle and high schools are considered full at 85% of their physical capacity.

Regarding the special education reductions: Kellogg is anticipated to support three focus classrooms. Optimal capacity for these classrooms is 12 students; as such, reducing the gross capacity by 45 student stations (three classrooms reduced by fifteen student stations at each) approximates the reduced capacity of this program.

Gross capacity, once refined by targeted reductions and with a utilization rate applied, becomes the school's *functional capacity*. See table 2 below for the sequence of student station reductions applied to Kellogg with the resulting functional capacity.

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<sup>1</sup> See [SCHOOL UTILIZATION BACKGROUND & METHODOLOGY](#) for further details.

**TABLE 2 - SUMMARY OF KELLOGG MS CLASSROOM REDUCTIONS**

CAPACITY REDUCTIONS			
Gross Capacity	Focus Program Reductions	Utilization Rate	Functional Capacity
945	45	85%	765

Functional Capacity is the District's primary indicator of the number of students supported by a given building. The average functional capacity for middle schools across the District is 733 student stations and at Kellogg Middle School it is 765.

# Enrollment & Program Balancing Southeast Guiding Coalition Phase 1 Recommendation

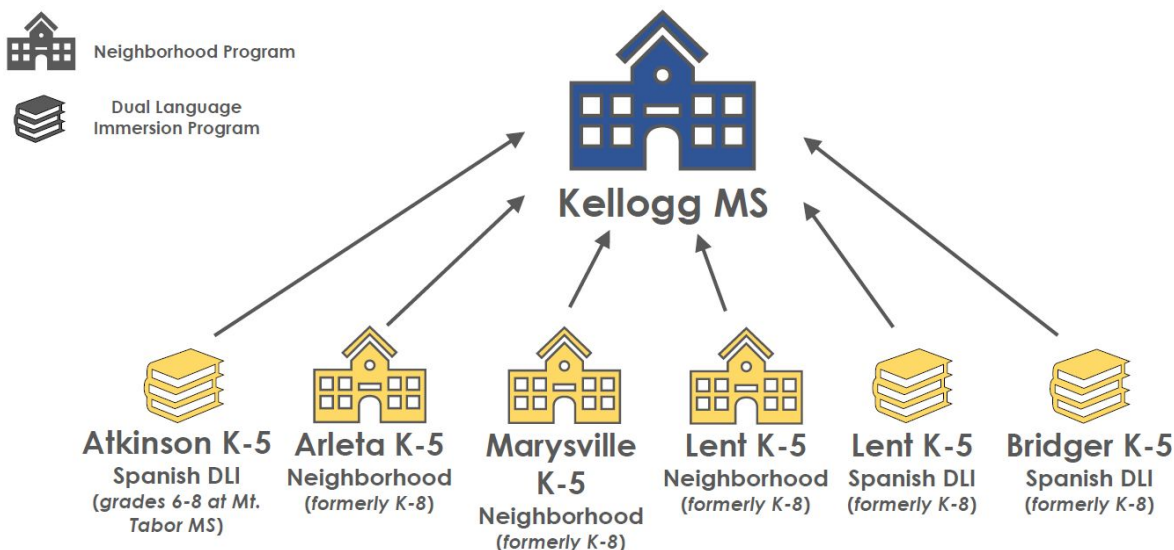
## Guiding Principles

Based on feedback from the community and guidance from the Board, the Southeast Guiding Coalition narrowed its work in Phase 1 to assigning schools and programs for Kellogg Middle School when it opens in Fall 2021. We worked toward a plan that could achieve several priorities:

- Converting as many K-8 schools as possible to K-5 schools in Fall 2021, in line with the district’s vision for comprehensive middle schools.
- Limiting Kellogg’s initial projected enrollment to 640 students (an 80% building utilization rate), to position it for a strong start and leave room for the enrollment spikes many new schools experience.
- Ensuring robust middle school programming, with an emphasis on the district’s Racial Equity and Social Justice (RESJ) Lens and prioritizing K-8 schools that serve the most Black students, Latinx students, and students from low-income families.
- Addressing the immediate space shortage at Bridger and allowing the kindergarten to return to the school (in its current configuration, the school is one classroom short for Fall 2021 even with the kindergarten offsite).
- Maintaining flexibility to consider Phase 2 options that enroll enough students at Harrison Park Middle School (in Fall 2022), reduce overcrowding at Franklin High School, and meet the Board’s other goals.

The recommendation below earned the most support through the coalition’s consensus process not because it is perfect, but because it meets our priorities better than any other option we considered. We believe PPS can address the main challenges it presents through targeted follow up in the coming weeks.

**Figure 1: Proposed Fall 2021 Kellogg Middle School Feeder Pattern**



# Enrollment & Program Balancing

## Southeast Guiding Coalition

### *Phase 1 Recommendation*

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## Recommendation Summary and Rationale

We recommend that the Arleta, Lent, and Marysville neighborhood programs feed to Kellogg, along with the Spanish DLI programs at Atkinson, Bridger, and Lent (see Figure 1 above). Arleta, Bridger, Lent, and Marysville would convert to K-5 schools in Fall 2021, and the single strand of grades 6-8 Spanish DLI at Mt. Tabor Middle School would relocate to Kellogg at the same time. We do not recommend long-term feeder paths for Bridger's neighborhood program or Creston at this time, but we recommend that PPS work with those communities to ensure the strongest possible experience for their middle school students next school year. We will recommend permanent feeder paths for both schools during Phase 2 of our work.

To arrive at this recommendation, we started with Arleta, Atkinson, Bridger, Creston, Lent and Marysville as possible Kellogg feeders based on proximity. We ruled out Atkinson's neighborhood program based on our charge to focus on K-8 students who don't already have access to a middle school. Next, we wanted to prioritize K-8 communities that serve the largest numbers of BIPOC students and students from low-income families. Lent and Marysville stood out in that regard.

Feeding Lent's neighborhood program to Kellogg also required us to feed its Spanish DLI strand, because Lent's middle school wouldn't work logistically or from a program equity standpoint with that one strand alone. We quickly realized that if we feed Lent's Spanish DLI strand to Kellogg, we need to feed others, because having just one Spanish DLI strand at Kellogg raises similar staffing and equity concerns. Bridger's two Spanish DLI strands became an obvious priority at this point, given the looming space shortage there.

Having assigned three of Southeast's four middle school Spanish DLI strands to Kellogg, we next had to consider whether to leave an isolated strand at Mt. Tabor Middle School. The consensus was that this strand should relocate to Kellogg (creating a split feeder for Atkinson), for several reasons. PPS DLI experts advised us that a unified program at Kellogg would be the better option for students. Additionally, Mt. Tabor Middle School is overcrowded, and while balancing its enrollment wasn't a focus of Phase 1, relocating a strand takes a small step toward addressing the problem.

We also saw a positive case for creating a consolidated Spanish DLI program at Kellogg. Of all the middle schools in Southeast, Kellogg is the most centrally located to the highest concentrations of native Spanish speakers, in line with one of the Board's goals for this process. Pooling all the middle school Spanish DLI resources into one school also comes with many potential benefits for the students and teachers who are part of the program. While creating this consolidated program was not our top priority, we felt it was the right choice after higher priorities pushed us most of the way toward that result.

These decisions left Arleta and Creston as the remaining potential Kellogg feeders, with space for only one of the two to fit within the 80% utilization target for Fall 2021. We recommend feeding Arleta for two reasons. First, while there's not a huge difference between the two schools' demographics, Arleta has recently served a higher percentage of BIPOC and low-income students. Second, Creston's long-term feeder path has significant implications for issues we'll consider during Phase 2 of this process—especially reducing overcrowding at Franklin High School. Of all the Kellogg feeder schools we considered, Creston is the only one that could plausibly shift to the Cleveland cluster, which could be an important part of a Phase 2 solution and is an option we wanted to keep on the table for further discussion.

# Enrollment & Program Balancing

## Southeast Guiding Coalition

### Phase 1 Recommendation

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## Recommendation Details and Summary Statistics

What **would change** in 2021-22:

- **Arlita** neighborhood program converts from K-8 to K-5 elementary. Grade 6-8 students transfer to Kellogg Middle School starting in the 2021-22 school year. The K-5 program feeds to Kellogg Middle School.
- **Marysville** neighborhood program converts from K-8 to K-5 elementary. Grade 6-8 students transfer to Kellogg Middle School starting in the 2021-22 school year. The K-5 program feeds to Kellogg Middle School.
- **Lent** neighborhood program converts from K-8 to K-5 elementary. Grade 6-8 students transfer to Kellogg Middle School starting in the 2021-22 school year. The K-5 program feeds to Kellogg Middle School.
- **Lent** Spanish dual language immersion program converts from K-8 to K-5 elementary. Grade 6-8 students transfer to Kellogg Middle School starting in the 2021-22 school year. The K-5 program feeds to Kellogg Middle School.
- **Bridger** Spanish dual language immersion program converts from K-8 to K-5 elementary. Grade 6-8 students transfer to Kellogg Middle School starting in the 2021-22 school year. The K-5 program feeds to Kellogg Middle School.
- Students in **Bridger's neighborhood program** will need a new school assignment, although the program's long-term feeder path won't be decided until Phase 2 of the coalition's work. (See "Challenges and Alternatives Considered" below for more details.)
- **Mt. Tabor** Middle School Spanish dual language immersion program transfers to Kellogg Middle School in the 2021-22 school year; Kellogg becomes the new feeder for the Spanish dual language immersion program at **Atkinson**.

What **would not change** in 2021-22:

- **Creston** remains a K-8 school in 2021-22, with its MS/HS feeder path to be confirmed in Phase 2 of the SEGC work. It will convert to a K-5 school in Fall 2022.
- **Harrison Park** remains a K-8 school in 2021-22, to be converted to a middle school in Fall 2022 as previously scheduled (with its feeder schools to be decided in Phase 2 of the guiding coalition's work).
- **Atkinson neighborhood program** remains assigned to Mt. Tabor MS for the 2021-22 school year. The guiding coalition will consider Atkinson's long-term feeder path during Phase 2 of its work.
- **All K-5 DLI program locations and configurations** remain unchanged for 2021-22. The coalition will consider any changes to these programs during Phase 2 of its work.
- **All K-5 attendance boundaries** remain unchanged for 2021-22. The coalition will recommend boundary changes, which would take effect in Fall 2022, during Phase 2 of its work.

Table 1 and Table 2 below provide detailed estimates for enrollment and student demographics under this recommendation.

# Enrollment & Program Balancing Southeast Guiding Coalition Phase 1 Recommendation

**Table 1: Enrollment and Utilization Estimates for Grade 6-8**

School	Programs	2019-20 Enrollment for Grade 6-8	2019-20 Building Utilization	2024-25 Forecast Enrollment for Grade 6-8	2024-25 Forecast Building Utilization
Arleta	Neighborhood	163	N/A	▲ 172	N/A
Bridger	Neighborhood	74	N/A	▼ 56	N/A
	Spanish Immersion	51		▲ 78	
Lent	Neighborhood	104	N/A	▼ 74	N/A
	Spanish Immersion	64		■ 64	
Marysville	Neighborhood	118	N/A	▲ 120	N/A
Mt Tabor	Atkinson Neighborhood Only	106	N/A	▼ 99	N/A
	Spanish Immersion	69		▼ 66	
<b>Phase 1 Recommendation</b>					
Kellogg	Neighborhood, Spanish Immersion	569	70.9%	▲ 574	71.5%

School/program included in Phase 1 recommendation

Utilization within 60-80% target range

Enrollment estimates are based on actual October 1, 2019 enrollment and include all transfers. Forecast enrollment is based on the Portland State University Population Research Center study published in 2020.

**Table 2: Socioeconomic Indicators for Grade 6-8 Enrollment Estimates**

School	Programs	Race & Ethnicity								Percent Free Meals	Percent Special Education	Percent English Language Learners
		Asian	Asian-White	Black	Latino	Native Amer.	Multi-Racial	Pacific Islander	White			
Arleta	Neighborhood	9.2%	3.7%	1.8%	22.1%	0.6%	8.0%	0.6%	54.0%	28.8%	19.6%	6.1%
Bridger	Neighborhood	16.2%	2.7%	12.2%	17.6%	1.4%	6.8%	2.7%	40.5%	50.0%	12.2%	14.8%
	Spanish Immersion	2.0%	3.9%	2.0%	70.6%	0.0%	2.0%	0.0%	19.6%	7.8%	13.7%	15.7%
Lent	Neighborhood	20.2%	1.9%	10.6%	36.5%	2.9%	8.7%	2.9%	16.3%	42.3%	24.0%	10.6%
	Spanish Immersion	1.6%	0.0%	3.1%	85.9%	0.0%	0.0%	0.0%	9.4%	31.3%	7.8%	17.2%
Marysville	Neighborhood	28.8%	4.2%	12.7%	14.4%	1.7%	10.2%	4.2%	23.7%	37.3%	17.8%	6.8%
Mt Tabor	Atkinson Neighborhood Only	14.2%	6.6%	1.9%	2.8%	0.0%	1.9%	0.0%	72.6%	3.8%	15.1%	3.8%
	Spanish Immersion	1.4%	0.0%	1.4%	58.0%	0.0%	2.9%	0.0%	36.2%	20.3%	8.7%	17.4%
<b>Phase 1 Recommendation</b>												
Kellogg	Neighborhood, Spanish Immersion	12.8%	2.6%	5.8%	39.0%	1.1%	6.5%	1.6%	30.6%	30.4%	16.9%	10.5%

School/program included in Phase 1 recommendation

Enrollment estimates are based on actual October 1, 2019 enrollment and include all transfers.



## Enrollment & Program Balancing Southeast Guiding Coalition Phase 1 Recommendation

**Table 3: Enrollment and Utilization Estimates for Affected Schools**

School	Building Capacity	Grades Serviced	Programs	Enrollment Estimate (Based on 2019)	Building Utilization	Building Utilization (w/o Modulars)	2024 Forecast Enrollment	2024 Building Utilization	2024 Building Utilization (w/o Modulars)
Arleta	642	K-5	Neighborhood	363	56.5%		▼ 344	53.6%	
Bridger	510	K-8	Neighborhood, Spanish Immersion	465	91.2%	128.8%	▼ 408	80.0%	113.0%
Kellogg	803	6-8	Neighborhood, Spanish Immersion	569	70.9%		▲ 574	71.5%	
Lent	658	K-5	Neighborhood, Spanish Immersion	307	46.7%	52.7%	▼ 246	37.4%	42.2%
Marysville	481	K-5	Neighborhood	265	55.1%		▲ 266	55.3%	
Mt Tabor	681	6-8	Neighborhood, Japanese Immersion	655	96.2%		▼ 630	92.5%	

Enrollment estimates are based on October 1, 2019 enrollment and include transfers.

**Table 4: Socioeconomic Indicators for Affected Schools**

School	Grades Serviced	Race & Ethnicity								Percent Free Meals	Percent Special Education	Percent English Language Learners
		Asian	Asian-White	Black	Latino	Native Amer.	Multi-Racial	Pacific Islander	White			
Arleta	K-5	9.1%	2.2%	2.8%	13.2%	0.0%	8.0%	0.0%	63.6%	26.7%	19.0%	7.7%
Bridger	K-5	5.6%	3.4%	7.1%	35.5%	0.0%	3.9%	1.5%	42.6%	27.3%	14.4%	16.1%
Kellogg	6-8	12.8%	2.6%	5.8%	39.0%	1.1%	6.5%	1.6%	30.6%	30.4%	16.9%	10.5%
Lent	K-5	11.4%	0.0%	9.8%	48.2%	0.0%	2.9%	0.0%	24.1%	43.0%	16.6%	32.9%
Marysville	K-5	12.5%	5.3%	9.4%	20.8%	0.0%	7.5%	3.0%	41.1%	38.9%	25.3%	16.2%
Mt Tabor	6-8	7.8%	15.7%	1.8%	5.8%	0.0%	4.3%	0.0%	64.3%	5.8%	12.7%	3.2%

Enrollment estimates are based on October 1, 2019 enrollment and include transfers.

## Enrollment & Program Balancing Southeast Guiding Coalition *Phase 1 Recommendation*

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### Challenges and Alternatives Considered

The recommendation above earned overwhelming consensus from the coalition, with more than 90 percent of 41 coalition members rating it a 3 or higher in a “fist-to-five” vote at our last Phase 1 meeting on December 17. Coalition members also identified potential challenges for PPS to address during implementation, and considered several possible solutions:

- **Middle school assignment for Bridger neighborhood students:** Moving Bridger’s middle school Spanish DLI program to Kellogg in Fall 2021 would require a new assignment for its neighborhood middle school students, because the neighborhood program is too small to exist by itself. Coalition members suggested Harrison Park K-8 and Kellogg as possibilities, but ultimately recommended that PPS engage with Bridger’s neighborhood middle school families to identify the best solution—with the understanding that the long-term feeder path for the neighborhood program will be decided during Phase 2 of the coalition’s work.
- **Delayed K-5 conversion for Creston:** Coalition members expressed concerns about Creston not converting to a K-5 school in Fall 2021 as many in the school community expected. The coalition considered and rejected an alternative that would have added Creston to the feeder schools in the recommendation, because it would have resulted in a utilization rate of more than 90 percent at Kellogg. We also considered and rejected a proposal to feed Creston to Kellogg instead of the Spanish DLI strand at Mt. Tabor Middle School: there is not room for both at Kellogg over the long run, and we feel the Mt. Tabor strand would need to relocate eventually (as explained in the “Recommendation Summary and Rationale” above). The coalition then overwhelmingly voted to recommend that PPS provide additional support to ensure the strongest possible middle school experience for Creston students next year. Another option would be assigning Creston’s middle school students to a combination of Hosford and Kellogg next year (since there isn’t space for all students at either school), allowing the school to convert to K-5 in Fall 2021. PPS should engage with the Creston community to identify the best solution for next year, with the understanding that Creston’s long-term feeder path will be decided during Phase 2 of the coalition’s work.
- **Split feeder for Atkinson:** Some coalition members expressed concern about introducing a split feeder for Atkinson, with Atkinson’s neighborhood program still feeding to Mt. Tabor Middle School after its Spanish DLI program begins feeding Kellogg. But the coalition considered and rejected an alternative that would keep the single Spanish DLI strand at Mt. Tabor, for the reasons discussed in the “Recommendation Summary and Rationale” section above. If this recommendation moves forward, PPS should engage with families and students enrolled in the Spanish DLI program at Mt. Tabor Middle School to ensure a smooth transition to Kellogg. During Phase 2 of its work, the coalition will take a closer look at the impact and desirability of split feeders under various circumstances.
- **Implications for middle school Chinese DLI programs:** Some coalition members expressed concern about not locating Chinese DLI programs at Kellogg—and in particular, the transportation implications if the coalition decides to relocate the Chinese DLI program at Hosford to another school in the future. The coalition considered but did not advance a scenario that would have fed middle school Chinese DLI to Kellogg (and Spanish DLI to the future Harrison Park Middle School), feeling that it would delay access to a middle school for too many K-8 students. The coalition will factor transportation considerations into any discussions about DLI program locations during Phase 2 of its work.



# Enrollment & Program Balancing

## Southeast Guiding Coalition

### Phase 1 Recommendation

## Additional Implementation Considerations

PPS staff have identified several additional implementation considerations, should this recommendation move forward.

- **Special Education Services:** The Special Education department indicated there will be at least one Special Education focus classroom at Kellogg MS in 2021-22, in addition to learning center supports. In future years, the department will need space for three focus classrooms at Kellogg, to offer a full continuum for services for students in the region. Leaving space for this was an additional consideration in initial limits on Kellogg's enrollment.
- **Transportation:** Students who live more than 1.5 miles from Kellogg will be eligible for PPS transportation, along with designated bus service as required for Spanish Immersion students, students with transportation included in their Individualized Education Plan and safety hardships. The table below shows which parts of the attendance areas of the proposed Kellogg feeder schools would be eligible for transportation. A full review of transportation factors for potential Kellogg feeder schools is located [here](#).

Phase 1 Neighborhood Feeder	Transportation Eligibility
Arleta	None - All of the attendance area is within 1.5 mile of Kellogg MS
Lent	All
Marysville	Southeast corner of the attendance area and area east of 82nd Ave.

- **Transfer students at Kellogg feeder schools:** PPS will review the number of transfer students currently enrolled in grades 5-7 at the proposed Kellogg feeder schools, and determine whether to recommend that they attend Kellogg or the middle school assigned to their residence.
- **Right to remain at Kellogg:** PPS recommends that the Board allow students who begin at Kellogg in Fall 2021 to remain there through eighth grade, regardless of any additional changes to feeder paths or attendance boundaries the coalition makes during Phase 2 of its work.

## Priorities for Phase 2

Ensuring that Kellogg Middle School can open in Fall 2021 is an important milestone in the coalition's work, but there's much more work to be done in Phase 2 this Spring to ensure schools across Southeast are set up for success over the long run. Some of the coalition's most important priorities for Phase 2 are below. (Some of the Phase 1 ideas the coalition discussed most frequently to address these priorities are included in the [appendix](#).)

- **K-5 conversion and middle school feeder assignment for Creston:** Creston's feeder pattern is a key decision with many ripple effects for addressing high school overcrowding and balancing middle school enrollment.

## Enrollment & Program Balancing

### Southeast Guiding Coalition

#### *Phase 1 Recommendation*

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- **Establishing feeder patterns that support robust enrollment across middle schools:** Lane and Harrison Park (converting to a middle school in 2022-23) will both need a boost in enrollment through feeder pattern changes, boundary changes, DLI program placement, or a combination of all three.
- **Addressing overcrowding at Franklin High School:** Franklin needs relief from serious overcrowding as soon as possible, to the tune of hundreds fewer students than it currently enrolls. Because many schools that could plausibly feed to Franklin won't be able to, determining priorities for Franklin feeders will be a top early priority in Phase 2. To develop solutions, the coalition will need a clear maximum enrollment target from PPS, and will need to think strategically about using available capacity in the Madison cluster through feeder pattern changes, boundary changes, or a combination.
- **Providing a neighborhood school for Harrison Park K-5 students:** With the conversion of Harrison Park K-8 to a middle school, its K-5 students will need to relocate. A nearby option is the Clark building, which currently houses the Creative Science K-8 focus program. To consider this option, the coalition will need clear guidance from PPS on viable alternate locations for Creative Science (or clear guidance that Creative Science cannot relocate at this time). Alternatively, the coalition could distribute Harrison Park K-5 students among other nearby elementary schools through boundary changes.
- **Considering DLI placement to strengthen programs, serve native speakers more equitably, and complement neighborhood programs:** This Phase 1 recommendation addressed placement of middle school Spanish DLI, but the coalition needs to consider the location and configuration of Spanish DLI programs at the K-5 and high school level; and Chinese, Japanese and Russian programs at all grade levels. PPS will need to provide clear guidance on preferred program configurations from an instructional and operational standpoint for the coalition to complete this work.
- **Addressing low enrollment at schools that have been converted from K-8 to K-5:** Low enrollment at Arleta, Marysville, and Lent could be addressed through boundary changes, DLI program placement, pre-K classroom assignment, or a combination of the above. The coalition will need clear guidance from PPS on the target enrollment for these schools in the short/medium term.
- **Determining boundary changes that support Phase 1 and Phase 2 recommendations:** Taking program placements, feeder patterns, enrollment targets, transportation considerations, and regional geography into account, the coalition will recommend boundary changes to support appropriate enrollment in SE schools.

# Enrollment & Program Balancing

## Southeast Guiding Coalition

### Phase 1 Recommendation

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## Dissent Statements

While the recommendation above earned consensus from a large majority of the coalition, some coalition members did not agree with it. The statements below have been provided by members of the coalition who strongly disagree with some aspects of the recommendation. .

- **Beth Brett:** On behalf of the Creston community, I do not agree with this recommended feeder pattern as it puts our middle school students at a distinct disadvantage. The academic, social, and emotional impacts of being the only remaining K-8 neighborhood school south of Powell Boulevard would negatively impact all of our students, especially those identifying as BIPOC and those with a lower socioeconomic status. Our students would receive fewer academic opportunities, receive a non-typical middle school social experience, and remain in a building that is not appropriate for a middle school. In addition, there is no identified solution for Creston in 2022, as Hosford is currently enrolled above 90% and the majority of the coalition has stated that there is no room at Kellogg. If this is the case in 2021, what will change for these middle schools in 2022 and what will happen to Creston? Is Creston to remain a K-8 indefinitely? Are other school feeder patterns to be disrupted to allow Creston middle schoolers a home? The coalition was unwilling to address these issues and assume they will be “considered” in Phase 2. It is unacceptable for the coalition to provide a recommendation that does not include all schools that were to be modified. The Creston community asks PPS to require the coalition to provide a solution for Creston middle schoolers prior to the end of Phase 1.
- **Min Cai:** I do not agree with the current recommendation on Kellogg feeders. It was rushed and not well vetted, fails to provide a comprehensive middle-school experience to as many students as possible in the 2021–22 school year, and does not leave the flexibility required for long-term enrollment balancing across the middle schools using the RESJ lens. Therefore, changes to some of the feeder schools in this recommendation should be allowed in Phase 2 to balance enrollment in all middle schools in SE. Min Cai

- **The recommendation was rushed and not well vetted.**

The coalition had only three meetings in December to determine Kellogg’s feeders, and was asked to vote on the recommendation in the second meeting. Due to the limited time for discussion, the recommendation was not well vetted, and the coalition still had questions—many of which remain unaddressed and unanswered.

- **The recommendation inequitably defers the conversion of Creston’ K–8 when there is space for Creston’s small 6–8 program at Kellogg in 2021.**

One deal breaker for Creston’s conversion to K-5 school in fall 2021 is that Creston could become a potential feeder to Cleveland to alleviate the overcrowding at Franklin. Under the coalition’s self-imposed restricting “rule” to feed an entire middle school to one high school, the coalition reasoned that if Creston’s 6–8 is assigned to Kellogg, then these students would have to feed to Franklin, not Cleveland, thereby automatically disqualifying Creston as a feeder to Kellogg. But this restricting “rule” has not been proven to be necessary nor feasible. Creston’s middle school placement should not be a deciding factor for its high school placement, and vice versa.

## Enrollment & Program Balancing

### Southeast Guiding Coalition

#### *Phase 1 Recommendation*

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The other main reason for deferring Creston's conversion is to cap Kellogg's enrollment at 80% in 2021. The pressing reason for opening Kellogg in 2021 is to provide comprehensive middle-school experience for students currently in K–8 schools. Yet the recommendation leaves Kellogg at 76% utilization and deprives those in Creston's small 6–8 program of the opportunity for a comprehensive middle-school experience for another year despite the fact that Kellogg could house these students with 92% utilization in 2021. Using the RESJ lens, this is unfair and inequitable for the Creston community.

- **The recommendation limits viable options for enrollment balancing across SE middle schools.**

The recommendation leaves inadequate flexibility in Phase 2. Flexibility in Phase 2 is critical to ensuring balanced and robust enrollment across all SE middle schools in the long term. Instead, the recommendation locks some potential Harrison Park feeders into Kellogg, which limits feeder options for Harrison Park and potentially leads to low utilization when it converts to a middle school in 2022.

As a potential solution to increase Harrison Park's enrollment, the recommendation suggests relocating the robust and successful Chinese DLI program in Hosford in inner SE to Harrison Park in outer SE in 2022—ignoring the fact that Kellogg is the central location for both Woodstock and Harrison Park's Chinese DLI programs, and that, if relocation of Chinese DLI is necessary at all, relocation to Harrison Park rather than Kellogg, puts a tremendous transportation burden on families in the Woodstock's DLI program, who account for over two thirds of the families in Chinese DLI program in SE. This would increase the number of Chinese-speaking students to be bussed and the distance Chinese-speaking families would have to commute. Using the RESJ lens, this is unfair and inequitable for the Chinese-speaking community in the Chinese DLI program.



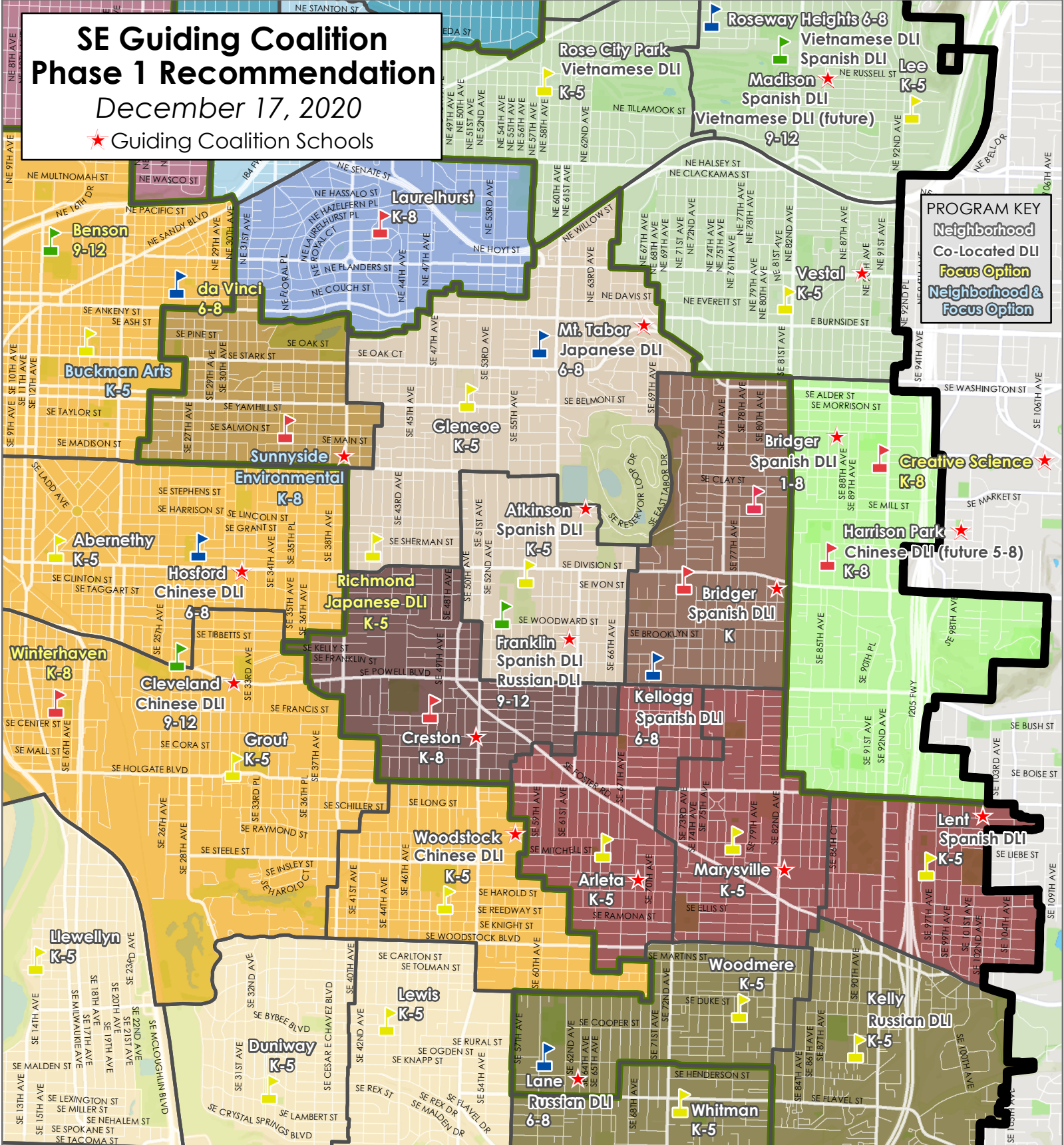
# SE Guiding Coalition Phase 1 Recommendation

December 17, 2020

★ Guiding Coalition Schools

**PROGRAM KEY**

- Neighborhood
- Co-Located DLI
- Focus Option
- Neighborhood & Focus Option



### School by Grades

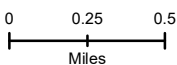
- K-5
- K-8
- 6-8
- 9-12
- District Boundary
- Existing - Middle School Attendance Area
- Existing - Elementary School Attendance Area
- Existing - High School Attendance Area

### Existing - Middle School Attendance Area

- Beaumont
- Beverly Cleary
- Bridger
- Creston

- Harriet Tubman
- Harrison Park
- Hosford
- Kellogg
- Lane

- Laurelhurst
- Mt Tabor
- Roseway Heights 0
- Sellwood
- Sunnyside
- Environmental





**PORTLAND PUBLIC SCHOOLS  
OFFICE OF DEPUTY SUPERINTENDENT**

**Business and Operations**

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**Date:** November 30, 2020

**To:** School Board, Southeast Guiding Coalition Members

**From:** Claire Hertz, Deputy Superintendent  
Dani Ledezma, Senior Advisor, Racial Equity and Social Justice  
Shanice Clarke, Director of Community Engagement

**Subject:** Southeast Guiding Coalition for Enrollment & Program Balancing  
Open House and Focus Group Feedback Summary

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**BACKGROUND**

As part of the Enrollment and Program Balancing process, PPS established the Southeast Guiding Coalition to influence and make recommendations for enrollment for the reopening of Kellogg Middle School. The Coalition is composed of students, parents and principals who represent stakeholder groups, schools and communities in Southeast Portland. In Phase 1 of a two-phase process, the Coalition met nine times over the past three months for initial planning that focuses on middle grades and will culminate with their recommendation in mid-December. The Coalition meetings held to-date aimed to develop a shared understanding of the overall charge and the process for developing the proposals and final recommendations. Utilizing data, community input, and facilitated conversations, the Coalition discussed and created multiple scenarios for the Enrollment and Program Balancing process. In response to the Coalition's inquiries about the lived experiences of the PPS families representing historically underserved communities a set of Open Houses and Focus Groups was held including an online survey released in 6 languages during the week of November 15, 2020. The goal of the survey was to gather the public's perceived concerns and priorities about the Enrollment and Program Balancing discussion proposal. Below is a summary of the feedback received in the Open House and Focus Group sessions and the feedback survey.

**SOUTHEAST GUIDING COALITION COMMUNITY OPEN HOUSE: PHASE 1**

**Summary**

For participants whose primary language is not English, Virtual Open House sessions were run simultaneously in Zoom rooms. Supported languages included Chinese, Russian, Somali, Spanish, and Vietnamese. Each room had a facilitator and note-taker fluent in the assigned language, and all materials were available in the five languages. The facilitator began with an

overview presentation of the process and work to date, shared a discussion proposal, and access to a survey for participants to submit their feedback. Participants were also encouraged to ask questions and make comments.

The Virtual Open House in English began in a live YouTube channel hosting over 840 participants during the 30-minute opening presentation led by Southeast Guiding Coalition parent leaders, PPS and FLO Analytics staff. After the English overview presentation, participants were guided to eight Zoom rooms to ask questions and give comments. At the end of the session, facilitators asked participants to complete a survey to submit feedback to the discussion proposal.

The following list reflects the number of participants for the Open House by room:

Table 1 Open House Participation by Language		
Meeting Room Language	Number of Participants at 7:15 pm	Number of Entries to the Room
Chinese	23	74
Russian	0	23
Somali	0	7
Spanish	26	137
Vietnamese	8	69
English #1	101	418
English #2	133	380
English #3	132	225
English #4	(Room was not functional)	42
English #5	127	418
English #6	113	293
English #7	132	230
English #8	107	254

*Note: Due to technical difficulties, at 6.48 p.m., the Zoom system closed all rooms. Rooms were restarted within a couple of minutes except for English #4 whose participants moved to other open rooms.*

## **OPEN HOUSE SURVEY RESPONSE SUMMARY**

The Open House Survey had 730 respondents who were asked the schools where their students attend school, if their students attend a focus option school or dual language program, and to identify their race and ethnicity.

School Attended	Number	Percentage
Abernathy	1	0.1%
Arleta	7	1.0%
Atkinson	69	9.5%
Bridger	63	8.6%
Cleveland	20	2.7%
Creative Science	130	17.8%
Creston	10	1.4%
Franklin	50	6.8%
Glencoe	92	12.6%
Grout	3	0.4%
Harrison Park	4	0.5%
Hosford	33	4.5%
Kelly	0	0.0%
Lane	1	0.1%
Lent	2	0.3%
Lewis	3	0.4%
Madison	4	0.5%
Marysville	8	1.1%
Mt. Tabor	152	20.8%
Richmond	37	5.1%
Sunnyside	4	0.5%
Vestal	4	0.5%
Whitman	0	0.0%
Woodmere	3	0.4%
Woodstock	109	14.9%
Other School	67	9.2%
Not Applicable	16	2.2%



Table 3  
Focus Option/Dual Language Program Characteristics of Respondents (N = 730)

Focus Option/Dual Language	Number	Percentage
Yes,	448	61.4%
No	258	35.3%
Not Applicable	20	2.7%
Don't Know	4	0.5%

Table 4 Demographic Characteristics of Respondents (N = 730)

Race/Ethnicity	Percentage
African American	1.0%
Asian	13.4%
Latinx	4.4%
Multi-Racial	10.0%
Native American	0.4%
Other	5.3%
Pacific Islander	0.1%
White	64.0%
No Response	1.4%

### **Proposal Response Summary**

The survey asked respondents three open-ended questions on what they like about the proposal, concerns they have about the proposal, and what they would like to share with the Guiding Coalition. Below is a summary of the responses from the survey reported by Race/Ethnicity groups.

**Priorities and Concerns - African American Race/Ethnicity**

<p>Table 5 Open House Survey Participant Priorities and Concerns - Responses by Parents who Identify as African American</p>
<p>Attempts to distribute facility resources in a balanced way</p>
<p>Moved into neighborhood five years ago and planned to walk children to school with a short walk through the park - we are being pushed out - no car - new boundaries changes schools - need to cross busy highway through to get to school 15 minutes away</p>
<p>Lack of/late in process engagement with communities affected, especially non-native English speaking and BIPOC communities</p>
<p>Creative Science School should not be moved</p>
<p>A new middle school needs to be filled, it seems unnecessary to upend working programs - focus on the middle school impact, leave things that are working alone - domino effect of decisions made under deadline pressure</p>
<p>Process needs to slow down- there is no way for everyone to be happy - the amount of change and disruption this is causing is not justifiable - not listening to community voices</p>
<p>Before addressing social equality in our schools you must address safety, first! Proposal is not a safe route for my children or my family</p>

The following are representative statements from the open-ended questions from the African American community:

“I’m concerned that these proposals result in segregation of minority students. It also removes diversity from neighborhood schools. I have two Black students who see very few students of color in their schools right now. Moving immersion programs to segregated buildings removes what little diversity there is. These actions do not represent equity. This is systemic racism in action. “

“I’m also appalled that the district is using voter funds to build schools with plans for filling them. Why was none of this determined prior to a school opening next fall? Filling a building should not be the driving factor. Making sure our students of color are represented and protected should be. PPS needs to stop talking the talk and start walking the walk.”

“This proposal would force our family to commute via car to a school or walk across a highway, another major street and several marijuana stores and liquor stores to attend.”

“I’m concerned about the segregation of native speaking students to all-immersion schools, some in outer East Portland. I’m concerned that kids of color in neighborhood programs like

Woodstock and Hosford will be left with less diversity of race and culture in already very white environment. They're already very isolated.”

“You're trying to tackle too much in a too short amount of time. Take a pause, solicit feedback from families of color to ensure that you aren't perpetuating systemic racism by segregating and isolating students of color. The district needs to listen to diverse voices in this process. Not enough outreach has been done to students and families of color, and native speakers, impacted by this wide reaching proposal.”

**Priorities and Concerns - Asian Race/Ethnicity**

<p>Table 6 Open House Survey Participant Priorities and Concerns - Responses by Parents who Identify as Asian</p>
<p>Many parents appreciate PPS hosting language specific focus groups and recommend to continue having them especially when there are important changes, so parents feel comfortable participating in the decision-making process</p>
<p>There is thought and consideration for equity and resource allocation</p>
<p>Address overcrowding of schools</p>
<p>Opening Kellogg - returning to K-5's and middle schools</p>
<p>Changing long-term Japanese DLI from central Grant to outer east Madison High School does not support district wide program participation with long commutes for many students who may choose to return to their neighborhood high school</p>
<p>Hope that this turns into a great opportunity to bring more resources (parent-wise) and attention to Madison to be an opportunity to be an AP or IB school and increase access to these programs</p>
<p>Combining Mandarin and Spanish immersion programs from multiple sites to an all DLI regional school in outer southeast neighborhoods where more native speakers live, does not support existing long-term, successful programs, and creates segregation furthering gentrification</p>
<p>Concern for students moving to DLI consolidated school locations losing a walking/biking neighborhood school to commuting further distances and loss of IB programming at high school level</p>
<p>Request for phasing in changes to allow students to complete a middle or high school level before full implementation</p>
<p>Lack of input from affected schools - Glencoe and Mt. Tabor parents were not told that changing the high school feeder was even up for discussion</p>

Concern for Creative Science School moving from current location without a new facility identified and maintaining K-8 school program

Keep natural neighborhoods together in a school especially Harrison Park and Tabor neighborhoods

Lack of real community engagement and short schedule of meaningful solicitation of input from affected families - these decisions have major impacts on families - allow a longer timeline to study and research recommendations

The following are representative statements from the open-ended questions from the Asian community:

“A history of understanding cultural exchange and the community created by JDL is something we as parents commit to from K-12. Grant has been home to the JDL program for over 20 years, and has become part of the fabric of how the program works and is supported.”

“I understand wanting to give opportunities to MANY kids, and make our school system far more equitable. But couldn't we do this with a bit more time to prepare? Our kids are being asked to adapt constantly. But to potentially force them to make a life altering choice after trying to adapt to so many other factors is not the best for their well being. Of course they will survive, but why put them through so much more. They need STABILITY right now.”

“Moving DLIs out of integrated schools reduces equity and community inter-relatedness; segregates/marginalizes BIPOC. Proposal puts outsized burden on BIPOC. Some students would be forced to choose between IB and DLI. Why is DLI the program targeted to help PPS “rebalance?””

“There are native Chinese families who specifically moved to the Woodstock area with the intent to enroll in the Woodstock DLI program. Over the past two decades that the Woodstock DLI program has existed, this has generated ethnic diversity in inner SE Portland.”

“The zoom meeting did not feel like a safe space for POC to vocalize something counter to the white majority, especially with the majority's collective fiery grievances about possible boundary/school changes. There is a cultural norm/expectation for POC to show deference to prophylactically prevent further emotional/psychological (and in some cases physical) harm, to avoid situations that exacerbate our inherent vulnerabilities. Therefore, it would be prudent for the district to schedule more BIPOC focus groups with a facilitator that can quickly/skillfully create a safe environment and succinctly recap themes from past BIPOC focus groups. My fear is that those that speak the loudest (likely not POC) and prioritize their micro communities will shape final decisions and undermine the original intent and RESJ lens.”

“I am disheartened and angry that the people of color on the SEGC are consistently dismissed and shut down. I am aghast that PPS is not listening to the parents whose children they serve. It is very clear from the open house that families want PPS to stop this sham of a process. And because of the pandemic and the disruption it's brought to students (especially the youngest ones), PPS needs to scale down and focus ONLY on determining which schools will feed into Kellogg and establish Harrison Park's neighborhood catchment, without touching DLIs and other programs.”

“One of the slides of the PowerPoint Presentation mentions: More DLI offerings near native speakers. The VDLI program at Rose City Park is not centrally located in the Vietnamese community. Since there are more Vietnamese families living in SE Portland than in NE, the timing is right to revisit the location of the Vietnamese DLI program, whether relocation or add another site in SE Portland. Transportation is a huge barrier for many Vietnamese who live in SE to enroll their children in NE school. This is one way to increase students in the VDL and improve the program.”

“How does the process Balancing Enrollment and Program contribute to/improve student success? We are more concerned about the quality of school and teaching/learning than anything else.”

**Priorities and Concerns - Pacific Islander**

Table 7 Open House Survey Participant Priorities and Concerns - Responses by Parents who Identify as Pacific Islander
There needs to be more engagement of students and families in the process
There needs to be more communication about the goals of the process

The following are representative statements from the open-ended questions from the Asian community:

“...I'm extremely concerned about the fast-track approach to changing the feeder situation for Mt. Tabor to Madison HS from Franklin. This affects students and their families and there has been almost no community participation or announcements about it. Most of the rebalancing news we were sent was about immersion language and re-opening Kellogg, so we mostly passed over it, as there is so much else to deal with in this extraordinarily stressful year. Most parents were aware of the need to open a new middle school at Kellogg; and the possible rebalancing of immersion language students at other MS, but we had NO IDEA of the additional scope of this project that drastically affects Mt Tabor - with families who have already invested time and resources into the Franklin community and are concerned about having to start over at a new high school in a more distant neighborhood with a younger sibling. It's inequitable from a family resource standpoint and an economics/environmental standpoint for many families who currently can walk and bike to Franklin and would have to cross a highway to attend Madison.”

““We are deeply opposed to changing the feeder situation during this chaotic year of distance learning, pandemic, economic hardship, political anxiety, and uncertainty. We urge the Rebalancing Committee to take a hard pause on this whole process and involve the community rather than trying to fast track a solution that will ultimately be inequitable for many. We demand that Glencoe ES parents and Mt. Tabor MS be included as representatives on this committee - our understanding is that there is no representation from our community of 1200 children and their families - likely close to 5000 people who would be affected.”

## Priorities and Concerns - Latinx Race/Ethnicity

Table 8 Open House Survey Participant Priorities and Concerns - Responses by Parents who Identify as Latinx
Proposal is a better socio-economic distribution
Ability to create more space for students
District is making new school buildings
Kellogg is an immersion feeder that feeds into Franklin
Mixed feedback on Spanish DLI at one site - from beneficial to students to segregation of community
Not looking at all inequities, it just seems like language is the main focus
Timing of decision during a pandemic and concern for number of changes in transition years impacting students - Resources should be focused on recovering from a crisis
Atkinson racially and socioeconomically blended community is a huge benefit Breach of trust DLI being shuttled from school to school - don't disrupt strong community that has been built
Moving DLI impact family work schedules - can't transport to new DLI schools
Concern for CSS facility identification and Bridger community students separated into four schools
Mt. Tabor to Madison change creates distance and long commute - can't walk to school

The following are representative statements from the open-ended questions from the Latinx community:

“Our family likes that with the DLI focus school that we might get better buy in from the English families since some neighborhood families are not super dedicated to the immersion experience. It is hard for us to keep our kids speaking Spanish and the whole Spanish school would really help. I hadn't heard this point so I wanted to put it in writing.”

“Please stop. Please go use your time to figure out how we are going to support our children on the other side of this pandemic because they are going to need significant extra resources and care especially BIPOC and those families who have not been able to afford to stop working and dedicate the last year educating their children from home. Which is what is required if a child is actually going to learn anything of substance.”

“Feels like you are segregating and pushing out the Latinx community to the forgotten outskirts of the city.”

“I have concerns about the amount of dissent among parents. There were very few voices that spoke up in support of the changes. It was very intimidating for anyone to speak up if you AGREED with the proposal.”

“This process has been fundamentally inequitable - materials have not been provided in multiple languages and are barely accessible to even English speakers.”

“Don’t do this. It upholds white supremacy and segregation of brown people.”

**Priorities and Concerns - Multi-Race Race/Ethnicity**

Table 9 Open House Survey Participant Priorities and Concerns - Responses by Parents who Identify as Multi-Race
Recognize efforts to increase socioeconomic diversity and attempt to use Racial Equity Social Justice lens Importance of students being able to walk to school and prevents some overcrowding - need to address more overcrowding
Spreads impact across more communities including affluent communities with more equitable demographics between Franklin and Madison
Support for opening Kellogg and availability of Middle School programs
Guiding Coalition wants to hear from community and others report families not consulted enough
Segregation of DLI programs combined at one school in outer SE Portland creates transportation hardship with longer commute, and dismantles strong long standing programs in place for decades, exacerbates inequities, loss of IB program
Loss of walkability, crossing busy streets and attending different school than siblings
Equity information has no synthesis of results making it hard to understand if proposal meets goals with too much detail
Some communities impacted by proposal excluded from process, and lack of transportation analysis
Lent neighborhood program families have to commute further with all DLI program
Pandemic creates too much disruption, social and emotional impacts, moving too fast - focus on Kellogg opening
Lack of location for Creative Science creates mistrust
Many elementary schools are under-enrolled in all scenarios-needs to consider converting

one of the existing K-8 buildings to a home for CSS and then re-drawing neighborhood boundaries.

The following are representative statements from the open-ended questions from the Multi-Race community:

“Sadly, our BIPOC family will leave the DLI program if all of southeast’s Spanish DLI programs are consolidated at Lent. Our family has experienced systemic racism and racial segregation in the past, and I will not let this happen to my children.

If PPS wants to move to the whole school model, it needs to reconsider aspects of scenario 9 — by having Atkinson house whole school Spanish DLI and Bridger house the neighborhood program, it keeps the communities together, solves Bridger’s overcrowding issue (no more portables needed), removes two co-located DLI programs, moves away from segregationist policies, and retains a location closer to the central city.”

“I think forcing children that live on the north side of Powell/Highway 26 to travel south across a major road when we can walk to Atkinson’s in 5 minutes is a terrible mistake and would create a huge logistical nightmare for parents, and cause unnecessary safety and environmental hazards. Please do NOT approve this proposal. My children have been enjoying this neighborhood since they were born.”

“Please carefully reconsider moving the High School JDLI program to Madison from Grant. Japanese language has been a part of Grant High School for over two decades. Grant’s central location allows equal access for JDLI students located throughout the PPS district.”

“Why not bring Bridger’s immersion classes to Atkinson as they are geographically close and Bridger is overenrolled and Atkinson under. Then you aren’t trying to ship off all the brown kids to the edges.”

“I do appreciate all the hard work you guys are doing, and I know you are trying to balance a lot of competing interests and achieve a better result for all our students. I know those on the Coalition with kids in PPS are certainly always thinking about it, but I hope that it’s always remembered that every school feels its community and cares about its community, and no school wants to be torn apart, and that all of those “strands” are made up of actual kids who haven’t seen their friends/teachers/buildings since before Spring Break of last year and who have already endured so many strange and scary changes.”

“You are saying the motivation is equity but you have not defined what that actually means and how the plan you are proposing meets your equity objectives. you need to provide the data on this to the community.”

“I would like the Guiding Coalition to take another look at Scenario 9, it seems like it meets all the outcome goals while preserving neighborhood schools.”

“You might have more success if you throw out the current proposal and use the time you’ve left yourselves to find the minimum action needed to get students into Kellogg and then iterate from there.”



## Priorities and Concerns - Native American Race/Ethnicity Group

Table 10 Open House Survey Participant Priorities and Concerns - Responses by Parents who Identify as Native American
The importance of a diverse experience (racial and socioeconomic) for student experience.
The importance of the application of the RESJ lens in scenario development and execution.
Need for examination of programming to ensure opportunities for participation in sports, Mock Trial and Con Law.
Concerns about the impact of decision making on transportation options.
Importance of maintaining options for neighborhood schools.

The following are representative statements from the open-ended questions from the Native American community:

“I believe the intentions are good”

“I think the district should do what it can to improve the lives and education opportunities for as many students as possible, with special focus on BIPOC students and NOT overcrowding building and class sizes”

“I want my JDLI student to experience more ethnic, cultural, and socioeconomic diversity. As a low-income, indigenous family, we are very much the minority. The JDLI lacks true diversity, especially when it comes to BIPOC and socioeconomic diversity. This has been difficult for my child and I would love for her to experience the diversity at Madison as opposed to Grant. When I first heard of this proposal a few days ago I bristled, but now that I have time to really think about it, I do think this is a great move on behalf of the district to promote equity and enrollment balancing for thousands of students who have been underserved for far too long.”

“I strongly disagree with pps taking away our neighborhood school. I place a high value on walkabout. We try to do just about everything within walking or biking distance. Going to Madison does not fit with our family's transportation style. Madison is not within our community. Taking trimet is not an option. If this plan moves forward we will be forced to unenroll our children from pps and put them in a school the fits within our boundaries. I believe children should always be given the opportunity to attend their neighborhood school. Neighborhood schools should not be used for focus schools. If you choose a focus school you are agreeing to transport your child to the school that houses that program. I am deeply disturbed that pps would try to take away neighborhood schools and bus kids far from their home and neighborhood. I will not allow my kids to be pushed out of their neighborhood”

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school you are agreeing to transport your child to the school that houses that program. I am deeply disturbed that pps would try to take away neighborhood schools and bus kids far from their home and neighborhood. I will not allow my kids to be pushed out of their neighborhood.”

**Priorities and Concerns - White Race/Ethnicity**

<p>Table 11 Open House Survey Participant Priorities and Concerns - Responses by Parents who Identify as White</p>
<p>Support for opening of new middle schools in the SE region and converting many K-8's to K-5's and 6-8 programs</p>
<p>Support the goal of the coalition is for all students of color, race, and socioeconomic status access to equitable resources to in order to succeed - adding more neighborhood schools such as Kellogg Middle School and Clark Elementary School to be used by the community who lives there with a need to identify a facility for Creative Science School in the same Phase</p>
<p>Consistency of feeder patterns from K-5 to high school and thoughtfulness using RESJ lens</p>
<p>It seems to be a serious attempt at equity in the Franklin and Madison clusters and Kellogg will draw from a diverse set of elementary programs - focus on underrepresented groups with careful consideration about locating immersion programs near where dual language households are.</p>
<p>Families and students are already under extreme stress due to this pandemic and loss of in-person school, and this is just such a drastic change and for the most vulnerable</p>
<p>The proposal for the middle school and high schools is tearing apart important neighborhood communities and it is evident there was no representation for all communities impacted</p>
<p>Current proposal is inconsistent with the District's commitment to sustainability and reducing the District's carbon footprint because it establishes boundaries that have students attending schools that are much farther away and harder to get to than the schools closest to their homes.</p>
<p>The current proposal is not completely balanced with overcrowding at Franklin, Bridger and near capacity at Kellogg which are feeders for the eastern boundary while at the same time, underutilization of Atkinson, Harrison Park and Woodstock which serve inner southeast</p>
<p>Isolating the DLI programs is segregation - we learned a long ago that "separate but equal" was a fallacy pushed by white supremacists</p>
<p>Ending co-location removes a richness from the neighborhood schools that opens the eyes of all students to cultural and racial diversity, ending co-location would reduce the connections between students of all backgrounds</p>
<p>Based on what was seen from the community meeting and all the concerns the hope is to go back to the drawing board and bring in more people to re-do this proposal in Phase 2</p>

The following are representative statements from the open-ended questions from the White community:

“Families have planned and worked very hard, sometimes for many years, to move into or stay in a certain neighborhood based on a desire to send their children to a preferred school, desires based on curriculum, community or responsible commuting options.”

“You say you want to limit transportation distances as one of your goals, but this proposal actually INCREASES distances from schools across the board. It is crazy that someone who lives a five minute walk from Franklin will now have to take a door to door commute to Madison that takes 45 minutes EACH WAY on Trimet.”

“This scenario is extremely concerning to me from a racial equity standpoint. When you segregate all four strands of Spanish elementary DLI to one school which is farther from the center and in an already underserved area, you are making our inner neighborhoods less diverse and isolating Latinx communities. You are also moving already underserved students from Lent away from their neighborhood school.”

“I think my main concern is that the committee is trying to move too fast to accomplish too much. Given that only the Kellogg Middle school changes need to be implemented for 2021, I recommend that the rest of the proposed changes be reviewed, discussed, and re-evaluated.”

“The Woodstock Neighborhood has been shaped by the Mandarin Immersion program for 22 years and has become an integral part of the local community. Businesses sprouted up that rely on the program for their very existence— including several Mandarin daycare and after school care centers. If the program left it would leave a giant hole in the community. Like many elementary schools this one is a community hub and ours would lose much of what people have worked so hard to make it. The school would become very homogeneous and lose much of the diversity that make it attractive.”

“I have no understanding of how the stated goals are being addressed. I've seen multiple redistricting proposals with wildly different impacts for my son's middle and high school possibilities in the past few weeks, and I have no idea how they've been whittled down. There's a bit of demographic data out now with the current proposal. I don't see a lot of benefit toward the stated goals. The whitest schools become more so in several cases.”

### **STUDENT SURVEY RESPONSE SUMMARY**

Students in the phase one schools were provided an opportunity to give feedback on the SE Enrollment and Program Balancing Process, with a survey that closes December 7, 2020. Responses are being gathered into a google form. There were 99 respondents to the student survey as of late November.

Students at the following schools in the phase one attendance area were reached for feedback: Atkinson, Arleta, Bridger, Creston, Harrison Park, Lent, Marysville, Mt. Tabor.

Race/Ethnicity	Number	Percentage
Asian/ Pacific Islander	5	5.1%
Black/ African American/Caribbean	6	6.1%
Hispanic/Latinx	7	7.1%
White/Caucasian	67	67.7%
Multiple/Mixed	14	14.1%
Native American/ Alaska Native	-	-
Other or No Response	-	-

	API	B/AA/C	Hispanic/ Latinx	White	Multiple
Agrees with dedicating Harrison Park to a 6-8 middle school	100%	100%	50%	85.2%	87.5%
Agrees with an entire school to Spanish Language Immersion programs (Lent)	100%	100%	50%	63.9%	75%
Agrees with Harrison Park graduates attending Franklin*	100%	100%	-	100%	-
Agrees with Mt. Tabor graduates attending Madison*	-	100%	100%	38.5%	66%

## **TEACHER SURVEY RESPONSE SUMMARY**

Teachers in the phase one schools were provided an opportunity to give feedback on the SE Enrollment and Program Balancing Process, with a survey that closed on November 23, 2020. There were 36 respondents to the teacher survey.

Teachers at the following schools in the phase one attendance area were reached for feedback: Atkinson, Bridger, Creative Science, Franklin, Harrison Park, Lane, Lent, Mt. Tabor, Woodstock

Teachers reported working in the following programs: neighborhood, Chinese, Russian and Spanish Dual Language Immersion, and special education.

Teachers reported working in the following roles: classroom teacher, special education teacher, teacher-librarian, educational assistant, learning specialist, school counselor, reading specialist, and English as a Second Language teacher.

Table 14 Teacher Priorities and Concerns
Support full school DLI program close to where native students live
Agree with moving Harrison Park K-5 students Clark where most of them live
Do not support single strand neighborhood or dual language programs
Support conversion from K-8's to K-5's and middle schools
Important to address racial inequities
Creative Science School needs a location - creates anxiety when unknown
Transition year creates under enrollment for K-5's feeding into Kellogg in fall 2021 before Phase 2 boundary changes for K-5 implemented in fall 2022.
Important to build strong community and student body at new and modified school programs - Strong building leadership creating vision for new configurations
Transportation needs and distance for changes to feeder patterns for neighborhood schools and programs
Creating lack of diversity and higher SES in some schools and lowering SES in other schools - segregation in all DLI schools
Need to offer special education programs in DLI schools
Creates and maintains under enrolment in some schools

Impact of families of making major shifts during a pandemic - needs greater input after the pandemic
Stay with focus on racial equity and social justice - frame the work with - Does this proposal address barriers to equitable outcomes?
Remember neighborhood schools - more focus has been on DLI than neighborhood programs
Program and enrollment balancing is disruptive to school communities and have had multiple processes in the past

**OPEN HOUSE FEEDBACK ROOMS**

**Summary of Priorities and Concerns**

On Thursday, November 19, 2020 PPS welcomed families, students, and community members to join a Southeast Enrollment & Program Balancing Virtual Open House, focused on Phase 1, to provide feedback, share their priorities, and explore the questions that matter for the future of the programs and infrastructure that support southeast schools.

Over **800 members of the community** participated in the Open House, providing a resounding theme in feedback that identified risks in the Phase 1 process.

**Phase 1 Risks & Phase 2 Opportunities**

- Feeder pattern changes for Harrison Park Middle School, especially during Phase 1, have a disproportionate impact to families of color
- Further engagement with native speakers in Dual Language Immersion programs may result in far fewer consequences to the student experience
- Based on a substantial level of requests to extended community engagement timelines to adapt to change due to the pandemic, PPS Staff will request the board limit Phase 1 changes to Kellogg Middle School elementary feeder patterns to be implemented in Fall 2021
- PPS staff will add any impacted school and program not already represented to the Guiding Coalition in Phase 2. Phase 2 would include primarily southeast changes to be implemented in Fall 2022: pK-12 enrollment balancing for under and over enrolled schools, attendance boundaries in southeast region, feeder pattern for Harrison Park Middle School, DLI program placements, facility for Creative Science School, special education regional program placement

**FOCUS GROUPS**

**Summary of Priorities and Concerns**

To enact on our commitment to partnerships and collaboration, particularly with Black, Native, and people of color, focus groups were held for additional feedback. Between Monday,

November 16th through Friday, November 20th, over 500 members of the PPS community participated in targeted opportunities for further feedback.

The Portland Association of Teachers along with PPS' RESJ Partners provided thought partnership in the process. RESJ partners include:

- Black Parent Initiative
- Immigrant & Refugee Community Organization (IRCO)
- Chess for Success
- Horizons Counseling
- Kairos PDX
- Self Enhancement Inc.
- Latino Network
- Michael Grice
- NAYA
- Coalition of Black Men
- Open School
- POIC
- REAP, Inc.
- TIAA
- Urban League
- Unite Oregon

## **Overview of Focus Group Priorities and Concerns**

### **Black, Indigenous, and People of Color**

Highlights:

- Group participants questioned the rationale behind the process continuing during the coronavirus pandemic.
- Participants also shared that the complexity of the program goals is too extensive for the current time frame.
- "Wealthy families with privilege want to avoid our kids"
- Additionally, participants expressed value for Kellogg being important, but the unintended impacts to surrounding schools leave many details to unpack that aren't appropriate during a pandemic.

### **Chinese**

Highlights:

- All parents expressed deep concern about the move from Woodstock. The main reasons were due to the success of the program and purchasing homes in the neighborhood of the program.
- Families expressed concern about late communication of the proposed changes, concern of transportation implications, and concern of loss of a multilingual student body if moved from Woodstock.

### **PAT/Teachers**

#### Highlights:

- Support for all immersion schools and suggest looking for any lessons from the changes between Rigler and Scott regarding dual language immersion and neighborhood program boundary change.
- The need for clarity around what transportation would be offered as programs are moved.
- Proposals and conversations are centered around dual language immersion, and there is a need to address overcrowding in neighborhood programs. Agreement to avoid single strands of classrooms (one teacher per grade level) in neighborhood and dual language programs.
- Recognition the 2021-22 year will be a year of transition when the elementary feeder schools to Kellogg will be small without the following year's boundary changes.

#### **Racial Equity & Social Justice Partners**

##### Highlights:

- Student experience needs to be better for them to be more successful - feel valued, a strong sense of belonging - overall goal to improve well-being of all students - academic success embracing multiculturalism
- In middle school grades, considering cultural competencies and culturally specific programming is critical and collaborative shaping of our programs - have young people direct the work of our program - self agency to develop and define what this looks like
- Messaging that students are exposed to within the facility is extremely important to help them feel comfortable, welcome and valued - getting in new facilities to enhance experiences
- Proponent of dual language schools - supports building the capacity of a broad range of successes in different areas
- I would support whole school DLI focus but at the same time putting in work around the benefits and explain those to the community
- More schools should be feeding into Madison. It doesn't seem right that we are feeding into Franklin so differently

#### **Russian**

##### Highlights:

- Participants requested that changes are not made. Russian Portlanders have big families that value safety, helping one another, and being together as a Slavic community.
- Families articulated not to divide their schools, but if necessary, do not divide the school teams so that they remain to help continue comprehensive school programs. Students are under the stress, and changes will further disrupt their experience.

#### **Somali**

##### Highlights:

- Parents underscored that they want to keep their students at their neighborhood school. If a Harrison Park split is approved, transportation issues need to be addressed.



- want from the district to address the transportation piece. (For example, one family stated that, if this proposal is implemented, their students will need to attend three different schools)

### **Spanish**

#### Highlights:

- Similar to European education parents want to encourage students to learn a second language such as Spanish and open more immersion programs
- There are big changes in the proposal, and parents need time especially during a pandemic to understand the proposal and the curriculum that will be offered - they want good changes for their children
- Some opposed the changes in the proposal because it takes away opportunities for students of color by isolating a cultural group and limiting DLI program to one location
- Students will be shocked to return to a different school after distance learning

### **Vietnamese**

#### Highlights:

- “Due to COVID 19, distance learning is necessary, but it has not met the needs of many students, especially students of color. Is it possible to move the proposal timeline so we can focus on supporting teachers so they can support students more effectively?”
- Students’ social/emotional well-being could be impacted by being removed from a friend group after a pandemic. Due to distance learning, students can’t hang out with their neighborhood friends now, and later on when they can return to school they may not even go to the same school.

**RESOLUTION No. 6227**

Resolution to Approve the Phase Two of the Internal Performance Audit Plan

**RECITALS**

- A. Board policy requires the Board of Education review and approve an annual performance audit plan.
- B. The auditors from the Office of the Internal Performance Auditor consulted with the 2020-21 Audit Committee, Board members, staff, and others in assessing District risks and operations in the development of a proposed audit plan ("Audit Plan").
- C. The Audit Committee met on December 2, 2020, discussed the proposed audit topics, and recommended the Hardship Transfer Audit be forwarded to the full Board for approval and be included in the previously approved 2020-21 Audit Plan.

**RESOLUTION**

The Board of Education hereby approves proceeding with Phase Two of the proposed 2020-21 Audit Plan, which adds the Hardship Transfer Audit to the previously approved 2020-21 Audit Plan.



**PORTLAND PUBLIC SCHOOLS**  
**OFFICE OF INTERNAL PERFORMANCE AUDIT**

501 North Dixon Street / Portland, OR 97227  
Telephone: (253) 985-1738

**Date:** January 5, 2021  
**To:** School Board  
**From:** Janise Hansen, CIA, Senior Internal Performance Auditor  
**Subject:** 2020-21 Updated Audit Plan

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In accordance with Board Policy (1.60.040-P) the Office of Internal Performance Audit submitted the 2020-21 Audit Plan to the Audit Committee for review and input. The Audit Plan for 2020-21 was approved by the Board on October 20, 2020 and at the time notice was given to the Board that an additional audit would be recommended by the Audit Committee. The Committee considered three possible audits (Facilities Use Audit, Hardship Transfer Audit, and English Second Language (ESL) Audit) at its December 2nd, 2020 meeting and made the decision to recommend the Hardship Transfer Audit to the Board.

The attached 2020-21 Audit Plan with Phase 2 detailing the addition of the Hardship Transfer Audit was reviewed and recommended by the Audit Committee to the full Board of Education for consideration and approval.

In summary the 2020-21 Audit Plan (both Phase 1 and Phase 2) will consists of the following audits:

- **ACH Audit** – completion of the audit from the 2019-20 Audit plan
- **Procurement Card Audit** – completion of the audit from the 2019-20 Audit Plan
- **Student Body Activity Funds Audit (ASB/SBF Funds Audit)** – 2020-21 Audit Plan – Phase 1
- **Health and Safety Checks Audit** – 2020-21 Audit Plan – Phase 1
- **Hardship Transfer Audit** – 2020-21 Audit Plan – Phase 2

ATTACHMENTS

- A. 2020-21 Updated Audit Plan

# Office of Internal Performance Audit (OIPA)

## 2019-20 Audit Plan

<p><b>Summary</b></p> <p><b>2020-21 Audit Plan in order of priority:</b></p> <ol style="list-style-type: none"> <li>1. ACH Audit (roll-over audit)</li> <li>2. PCard Audit (roll-over audit)</li> <li>3. ASB/SBF Funds Audit</li> <li>4. Health and Safety Checks Audit**</li> <li>5. Hardship Transfer Audit</li> </ol> <p>**The Health and Safety Checks Audit will only be done if students begin to attend in person classes during the 2020-21 school year. If that happens, Health and Safety Checks Audit will take priority over the other audits that are underway.</p> <p>This Audit Plan has been updated to include the Hardship Transfer Audit (added 1/12/21).</p>
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Operational Areas / Programs	2016 Risk Assessment		SoS Audit
	Inherent	Control	
<u>1. ACH Audit (roll-over audit from the 2019-20 Audit Plan)</u>	N/A	N/A	N/A
<p><b>Objectives/Goals:</b> To determine if the internal controls implemented by management in response to the fraudulent ACH transaction are in place and operating as intended to safeguard District funds.</p>			
<p><b>Background Information:</b> In August of 2019, there was a fraudulent ACH transaction. The District was able to recover all funds. In response, District management has taken actions to strengthen internal controls around the processing of ACH transactions. The audit will determine if the internal controls are in place and operating as intended to safeguard District funds. In an Audit Committee meeting on October 9, 2019, Claire Hertz, Deputy Superintendent of Business &amp; Operations, requested an audit of the internal controls implemented by management in response to the fraudulent ACH transaction. The Audit Committee approved the addition of the ACH Audit and recommended the ACH Audit to the full Board for approval. The Board approved the addition of the ACH Audit to the audit plan in a Board meeting on October 29, 2019.</p>			
<p><b>Risks:</b> Internal controls intended to strengthen the District's ability to protect District ACH transactions from fraudulent activities may not be in place or operating as intended leaving the District vulnerable to future fraudulent ACH transaction activities.</p>			
<p><b>Timing:</b> This is a roll-over audit from the 2019-20 Audit Plan. This audit is currently underway. We anticipate this audit being completed in November with the report being presented to the Audit Committee in December 2020.</p>			
<p><b>Estimated Hours:</b> 300</p>			
<p><b>Audit Scope, includes but not limited to:</b></p> <ol style="list-style-type: none"> <li>1) To determine if there is appropriate segregation of duties related to ACH transactions.</li> <li>2) To determine if appropriate access to the District's financial software is appropriate based on the staff's roles and responsibilities.</li> <li>3) To determine if Finance Department staff have completed the required Fraud Awareness training (required annually).</li> <li>5) To determine if internal controls related to ACH transactions agree to best practices.</li> <li>6) To determine if internal control related to ACH transactions are in place and operating as intended to safeguard District funds.</li> </ol>			

# Office of Internal Performance Audit (OIPA)

## 2019-20 Audit Plan

Operational Areas / Programs	2016 Risk Assessment		SoS Audit
	Inherent	Control	
<b><u>2. PCard Audit</u></b> (roll-over audit from the 2019-20 Audit Plan)	N/A	N/A	Recommendation #6
<p><b>Objectives/Goals:</b> To determine if new guidelines, review process, and department audit of PCard purchases that took effect in April 2019 were implemented and that the operations controls are working effectively and efficiently. To determine if the District's internal controls related to PCard transactions are adequate to ensure the safeguarding of District funds.</p>			
<p><b>Background Information:</b> Use of PCards allow District employees to easily make purchases without having to request preapproval, which has reduced administrative burden, and also take advantage of a 1.7% rebate on standard card purchases. The Secretary of State (SoS) reported that its review of Pcard transactions from July 2016 through March 2018 found the District's internal controls fall short of controls used by the State of Oregon and some other school Districts. The report also stated with 385 cardholders, the District has more cards in circulation and more spending than other large Districts in Oregon.</p>			
<p><b>Risks:</b> Fraud, waste, and abuse can occur when there is no thorough review of PCard purchases; documents are not verified to support purchases; verification for the business purpose of expense is not validated; insufficient category is not defined for tracking expenditures; or PCard is used inappropriately.</p>			
<p><b>Timing:</b> This is a roll-over audit from the 2019-20 Audit Plan. This audit is currently underway. We anticipate this audit being completed in January with the report being presented to the Audit Committee in February 2021.</p>			
<p><b>Estimated Hours:</b> 400</p>			
<p><b>Audit Scope, includes but not limited to:</b> The items listed below were the steps taken by the department after the Secretary of State audit. The review will be to validate the new processes were implemented and:</p> <ol style="list-style-type: none"> <li>1) Management developed monthly report for reporting all infractions.</li> <li>2) Infraction audit team began monthly meetings to review prior month's infractions.</li> <li>3) Restrictions were implemented for certain purchases.</li> <li>4) New PCard Manual incorporating new infraction table, new MCC code restrictions, updated list of prohibited and permitted purchases, and new guidance around certain purchases was created.</li> <li>5) Management developed new set of template emails to notify cardholder, supervisors, and HR (as applicable) of infractions and disciplinary action.</li> <li>6) Training materials for implementation of supervisor approval process in Bank of America Works was developed.</li> <li>7) Auditor will randomly select reports reviewed by managers and validate reviews performed by the department were in accordance to the department policy and procedure.</li> </ol>			

Operational Areas / Programs	2016 Risk Assessment		SoS Audit
	Inherent	Control	
<b><u>3. Student Body Activity Funds Audit (ASB/SBF Funds Audit)</u></b>	5	4.55	N/A
<p><b>Objectives/Goals:</b> To determine whether the District has adequate internal controls to ensure the complete and accurate accounting, tracking, and safeguarding of student body funds.</p>			
<p><b>Background Information:</b> School principals provide oversight and are responsible for ensuring that student body funds are spent for the general welfare of the student body. While each school principal has the ultimate responsibility for all activities at the school site, many responsibilities for student body funds management function may be delegated to the office manager or other staff members. The Student Body Funds was an item that was on the 2016 Risk Assessment and was rated as being a high risk area. The policies and procedures (P&amp;Ps) that are in the PPS' Policies website have not been updated since 2002. The Deputy Superintendent also reported that there has not been an audit performed in this area.</p>			
<p><b>Risks:</b> There is high risk/opportunity for fraud in this area. There is a risk internal controls in the schools are not adequate to ensure the complete and accurate accounting, tracking, and safeguarding of student body funds.</p>			
<p><b>Timing:</b> We anticipate this audit being completed in May with the report being presented to the Audit Committee in June 2021.</p>			
<p><b>Estimated Hours:</b> 600</p>			
<p><b>Audit Scope, includes but not limited to:</b></p> <ol style="list-style-type: none"> <li>1) Review policy and procedure for handling student body funds.</li> <li>2) Determine adequacy of training provided for cash handling.</li> <li>3) Evaluate how funds are collected/recorded / reconciled at each fund raising event.</li> <li>4) Obtain cash receipts or lists of students who were required to pay fees to the amounts collected.</li> <li>5) Inquire how school principals are evaluating complete and accuracy of accounting of funds.</li> <li>6) Determine if there is an effective oversight of all funds collected from fees/fund raising for all schools.</li> <li>7) Evaluate recording of funds collected from fees and fund raisings, and expensed by students.</li> <li>8) Determine if there is consistency in handling student body funds amongst all PPS.</li> <li>9) Examine how PPS is receiving donations and how they are recorded.</li> <li>10) Evaluate the processes in closing the books at the end of each school year.</li> </ol>			

# Office of Internal Performance Audit (OIPA)

## 2019-20 Audit Plan

Operational Areas / Programs	2016 Risk Assessment		SoS Audit
	Inherent	Control	
<b>4. Health and Safety Checks Audit</b>	N/A	N/A	N/A
<p><b>Objectives/Goals:</b> To determine whether school buildings (where students are attending in person classes) are in compliance with the building safety plan put in place due to the conoravirus pandemic.</p>			
<p><b>Background Information:</b> As the District begins to have students attending in person classes and/or activities compliance with the each school building safety plan will be crucial to safeguarding the health and safety of District students and staff.</p>			
<p><b>Risks:</b> There is a risk that school buildings will not be in compliance with the building safety plan which should lead to an increased risk of spreading the coronavirus.</p>			
<p><b>Timing:</b> This audit will begin when/if students begin attending in person classes and/or activities. Results will be provided to District administration within two days of the site visit to ensure timely feedback. A summary of the results of the site visits completed to date will be provided to the Audit Committee at each meeting.</p>			
<p><b>Estimated Hours:</b> 200</p>			
<p><b>Audit Scope, includes but not limited to:</b></p> <ol style="list-style-type: none"> <li>1) Review of the buildings safety plan.</li> <li>2) Determination of whether the building is in compliance with the building safety plan.</li> </ol> <p>NOTE: The audit will not determine the adequacy of the building safety plan, it will only determine compliance with the building safety plan.</p>			

Operational Areas / Programs	2016 Risk Assessment		SoS Audit
	Inherent	Control	
<b>5. Hardship Transfer Petitions Audit</b>	N/A	N/A	N/A
<p><b>Objectives/Goals:</b> To determine whether the District's decisions related to hardship transfers petitions are adequately supported. To determine whether the District's hardship transfer petitions process has a disproportionate or inequitable impact on a student/school community.</p>			
<p><b>Background Information:</b> Generally, students new to PPS are expected to enroll at their neighborhood schools, and do not need to complete transfer requests. PPS families use the hardship transfer petition process to request transfer out of a child's current/assigned school to a different neighborhood school, or a focus option grade level not available during the lottery cycle and all focus option grade levels after the lottery cycle has closed. The petition system is an opportunity for problem solving. Families can utilize the hardship transfer petition process to explain why their child's needs are not met at the neighborhood or current PPS school and how transferring to a different school would improve the situation. PPS staff will consider any reason for a transfer. Common transfer reasons include childcare, physical risk to a child at a school, and sibling considerations. Petitions are available year round and approximately 2,500 hardship transfer petitions were processed by the Enrollment and Transfer Department during the 2019-20 school year.</p>			
<p><b>Risks:</b> There is a risk the District does not have adequate internal controls in place to ensure decisions related to hardship transfer petitions are adequately supported. There is a risk the District's hardship transfer petition process has a disproportionate impact on a student/school community or other unintended inequities.</p>			
<p><b>Timing:</b> While the audit is estimated at 300 audit hours, the audit will need to take place over the course of six to nine months. Once the audit is approved by the Board we will select a sample of hardship transfer petitions from the approximately 2,500 petitions that were processed during the 2019-20 school year. Once the selection of petitions for testing has been provided to District staff, the Enrollment and Transfers Department will need several months to gather and provide all the supporting documentation considered in making the decision to approve or deny the petition. We anticipate the audit will be completed by late Spring or early Summer 2021.</p>			
<p><b>Equity Risks/Potential Impacts:</b> There is a risk the District's hardship transfer petition process has a disproportionate or inequitable impact on a student/school community.</p>			
<p><b>Estimated Hours:</b> 300</p>			
<p><b>Audit Scope, includes but not limited to:</b></p> <ol style="list-style-type: none"> <li>1) Review and evaluate District policies, procedures, and practices related to hardship transfer petitions.</li> <li>2) Review and evaluate data tracking hardship transfer petitions.</li> <li>3) Review and evaluate supporting documentation considered in the hardship transfer petition decision making process.</li> </ol> <p>NOTE: When the scope of an audit and audit results could have a direct impact on student/school communities, the scope of the audit could include outreach to potentially impacted student/school communities to identify and evaluate potential burdens, benefits, and outcomes.</p>			

**RESOLUTION No. 6228**

Election of Board Chairperson

Director \_\_\_\_\_ is hereby elected Chairperson of the Board for the period beginning January 12, 2021, until his/or her successor is elected.





**RESOLUTION No. 6229**

Election of Board Vice-Chairperson

Director \_\_\_\_\_ is hereby elected Vice- Chairperson of the Board for the period beginning January 12, 2021, until his/or her successor is elected.

