

**BOARD OF EDUCATION**

Portland Public Schools  
**STUDY SESSION**  
February 17, 2015

**Board Auditorium**

Blanchard Education Service Center  
501 N. Dixon Street  
Portland, Oregon 97227

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

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

*This meeting may be taped and televised by the media.*

**AGENDA**

1. **PUBLIC COMMENT** 6:00 pm
2. **SMARTER BALANCED ASSESSMENT READINESS** 6:20 pm
3. **UPDATE: ASSESSMENT WORKGROUP** 6:35 pm
4. **2015-16 BUDGET: STAFFING PRIORITIZATION** 7:50 pm
5. **2015-16 BUDGET: FUNDED PROGRAMS** 8:20 pm
6. **UPDATE: ENROLLMENT BALANCING AND  
2015-16 RECOMMENDATIONS** 9:05 pm
7. **UPDATE: LEGISLATIVE SESSION** 9:30 pm
8. **UPDATE: PGE SOLAR LEASE** 9:45 pm
9. **ADJOURN** 10:00 pm

**Portland Public Schools Nondiscrimination Statement**

Portland Public Schools recognizes the diversity and worth of all individuals and groups and their roles in society. The District is committed to equal opportunity and nondiscrimination based on race; national or ethnic origin; color; sex; religion; age; sexual orientation; gender expression or identity; pregnancy; marital status; familial status; economic status or source of income; mental or physical disability or perceived disability; or military service.



# Board of Education Informational Report

## MEMORANDUM

**Date:** 12 February 2015

**To:** Members of the Board of Education

**From:** Joe Suggs, PhD  
Director of Research, Evaluation & Assessment

**Subject:** Update on Smarter Balanced Assessment implementation

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This Memorandum provides an update on readiness for the Smarter Balanced Assessment administration this spring. Included in the packet attached to this memorandum are updates of key areas of readiness including:

- Reporting on parent requests for exemptions from testing, including the current Parent Request for Exemption from Required Statewide Assessments form and counts of students and tests for which exemption requests have been received (as of 4 February). Thus far, we have received requests for 35 students.
- Training of test coordinators (TCs), test administrators (TAs) and principals. Training of TCs and principals is complete, with ongoing support available, particularly for developing testing schedules. 90% of schools report being on track with training of TAs.
- Development of testing schedules. About 78% of schools report being on track with developing schedules. Our District Test Coordinator, Mary Anderson, is providing support to schools in this area, including reaching out specifically to the 22% of schools not on track.
- Preparing students to be familiar with new item types and accessibility resources in the testing interface. About 58% of schools report being on track with helping students to prepare through exposure to the practice tests.
- Addressing technology needs. Our IT department has delivered new Chromebook carts to be used for assessment and instruction to 33 locations, with additional deliveries scheduled. IT continues a “strike team” analysis of existing technology in all schools and plans to address quick-wins (like memory upgrades, replacing broken keyboards or mice, etc.).
- Communication with families, including samples of family communications produced thus far. Several documents have been made available to families around Smarter Balanced over the past several months, with additional communications planned including video and parent nights.
- Availability of assessment results and scores, including the use of Smarter Balanced scores for Essential Skills.

## Portland Public Schools Smarter Balanced Readiness Plan and Progress

The following areas of focus are included in our Smarter Balanced readiness project plan.

Area	Action	Progress
Reporting	Principal readiness survey	1 <sup>st</sup> administration given 2/5 2 <sup>nd</sup> administration to be given 3/5
	Parental exemption request monitoring	<ol style="list-style-type: none"> <li>1. Required process communicated to principals 1/8</li> <li>2. All requests received in R&amp;E are logged in a database</li> <li>3. Regular updates are provided to executive leadership (right now about every 3 weeks, will increase frequency as we get closer to and enter the Smarter testing window)</li> <li>4. See section below for additional information.</li> </ol>
Assessment Training	School Test Coordinator (STC) Trainings Delivered and optional additional training scheduled	<ol style="list-style-type: none"> <li>1. Initial required STC trainings covering security, accessibilities, general testing, OAKS, ELPA, and some Smarter Balanced highlights delivered Nov-Dec</li> <li>2. Second required STC training delivered in January, focus on Smarter Balanced</li> <li>3. Optional OAKS Portal and online reporting trainings scheduled for week of February 23</li> </ol>
	Principal Training Delivered	Required principal training (same content as STC but a little less detailed) delivered in 1/8 Leadership Academy
	Test Administrator Training	<p>Test Administrator (TA) training – individual review of required training materials to happen in schools with STC providing a Q&amp;A opportunity. Principals to provide 4 hours of staff meeting time between Dec and Feb to provide time for the TA training.</p> <p>Over 90% of schools report being on track with TA training. DTC will work individual with schools at risk or that have concerns.</p>

Area	Action	Progress
Testing Schedules	Provide support to schools for developing comprehensive testing schedules	<p>Definitions and general guidelines for what needs to be included in schedule development delivered in STC trainings.</p> <p>District Test Coordinator (DTC) is making herself available individually to schools for scheduling assistance (has already provided 1:1 assistance to 7 schools, and an additional 6 are scheduled).</p> <p>Optional group scheduling meeting held for high school administrators on 1/21, about six high schools attended</p> <p>As of 2/5, about 78% of schools report being on track with scheduling. DTC will reach out to schools at risk or that have concerns around scheduling.</p>
Student Readiness	Students experience the practice test	Principals and STC have been asked to be sure students have an opportunity to experience the practice test prior to taking the actual test. As of 2/5, about 58% of schools report having completed this or are on track to complete it. DTC is reaching out to schools at risk for not completing this.
Technology	Identification of technology needs	IT has completed a strike team analysis of deficiencies in existing technology and has prioritized schools who will receive new Chromebook carts.
	Distribution of new technology	33 Chromebook carts (50% of new carts) have been delivered to schools. Earbuds for the ELA portion of the assessment will be delivered prior to testing. All carts for non-high schools to be distributed by 2/18.

Area	Action	Progress
Family Communications	Various communications have been developed and distributed.	See included samples of already distributed communications: <ul style="list-style-type: none"> <li>• What Families Need to Know postcard</li> <li>• College and Career Ready: Smarter Balanced Assessments coming this spring advisory</li> <li>• College and Career Ready: Common Core State Standards and Smarter Balanced Assessments advisory</li> <li>• Standardized testing in schools: Information for Families advisory</li> </ul>
	Additional communication tools are being developed.	<ul style="list-style-type: none"> <li>• Smarter Balanced introduction video in multiple languages.</li> <li>• 11<sup>th</sup> grade parent communication specifically addressing Smarter Balanced, graduation requirements, etc.</li> <li>• R&amp;E presentations to PTA meetings and parent information nights (3 done so far with half-dozen more scheduled).</li> <li>• 4. Feb 25 parent academy at Rosa Parks</li> </ul>

**Scoring and Results**

Because a significant portion of the Smarter Balanced assessment is constructed or extended constructed response (short and long answer), those portions of the test must be scored by human raters. Right now, Smarter Balanced estimates it will take three to six weeks from when a test is completed until all components have been scored, scores are combined and results are available for an individual student. Students will not receive results immediately upon completion of the assessment.

While the Smarter Balanced consortium has identified initial performance levels, they are continuing to look at data from the field test. They have not yet provided field test results to states for state-level analysis and any additional level setting states may want or need to do. For example, where Oregon needs to determine different cut scores specifically for Essential

Skills purposes, they are unable to do so until they receive data. Right now, ODE estimates it will likely be end of summer or early fall before additional cut scores or levels are provided by the ODE.

### **Parent Requests for Exemption**

The directions given to building administrators this year for handling parental requests for exemptions from state require test are as follows (note that NAEP and TIMSS are federally required tests and have different rules about exemption and are not included on the PPS form or in the counts below):

#### **Administrator Instructions**

1. Parents indicate to school administrator they want to exempt their student from one or more required state tests.
2. Administrator (Principal or Vice/Assistant Principal) talks with parents about requirements of state testing, how results are used and the impact of having students not participate.
3. If the parents still want to exempt their student, they must complete the district exemption form. In particular, parents must check either the religious or disability box. Other, written-in reasons will not be accepted.
4. A school administrator must approve (initial or sign) and date the bottom of the form.
5. Schools need to keep a copy of the form on file and a copy must be sent to the Research, Evaluation & Assessment office.
6. R&E will log the exemptions and, if appropriate, will block students from being able to take computer assessments. Schools are responsible for ensuring that exempted students are not tested on non-computerized assessments (e.g., Kindergarten Assessment, Extended Assessments).
7. Forms received after a student has already begun testing may not be accepted and results for students who tested before an exemption form was received may remain in the PPS and ODE data systems.
8. R&E shares opt-out numbers on regular basis with Senior Directors.

Note: Schools need to review and send copies of forms to R&E as promptly as possible so that we avoid testing students whose parents request an exemption.

A copy of the most current request for exemption form is included in this packet along with a summary of requests received as of 2/4/15.

### **Smarter Balanced and Essential Skills for Graduation**

Up through this year, OAKS is the primary method most students will use to demonstrate proficiency in the Essential Skills required for graduation (math, reading and writing). For this year's juniors and younger students, Smarter Balanced will continue to be an option for demonstrating proficiency. However, in part because students now only have one opportunity

in high school to take that summative test, an increasing number of our students will need to rely on the other available options for demonstrating Essential Skills proficiency (like PSAT, SAT, ACT, work samples).

While Smarter Balanced will be an acceptable method for demonstrating proficiency, it will likely be late summer or early fall 2015 before ODE announces the official scores needed on the Smarter Balanced test for Essential Skills purposes. Using data from the spring 2014 field test, ODE will determine Smarter Balanced scores that are equivalent to the OAKS scores needed to demonstrate proficiency. These Essential Skills cut scores will be different from the scores that are considered proficient on the Smarter Balanced assessment as a standardized summative assessment.



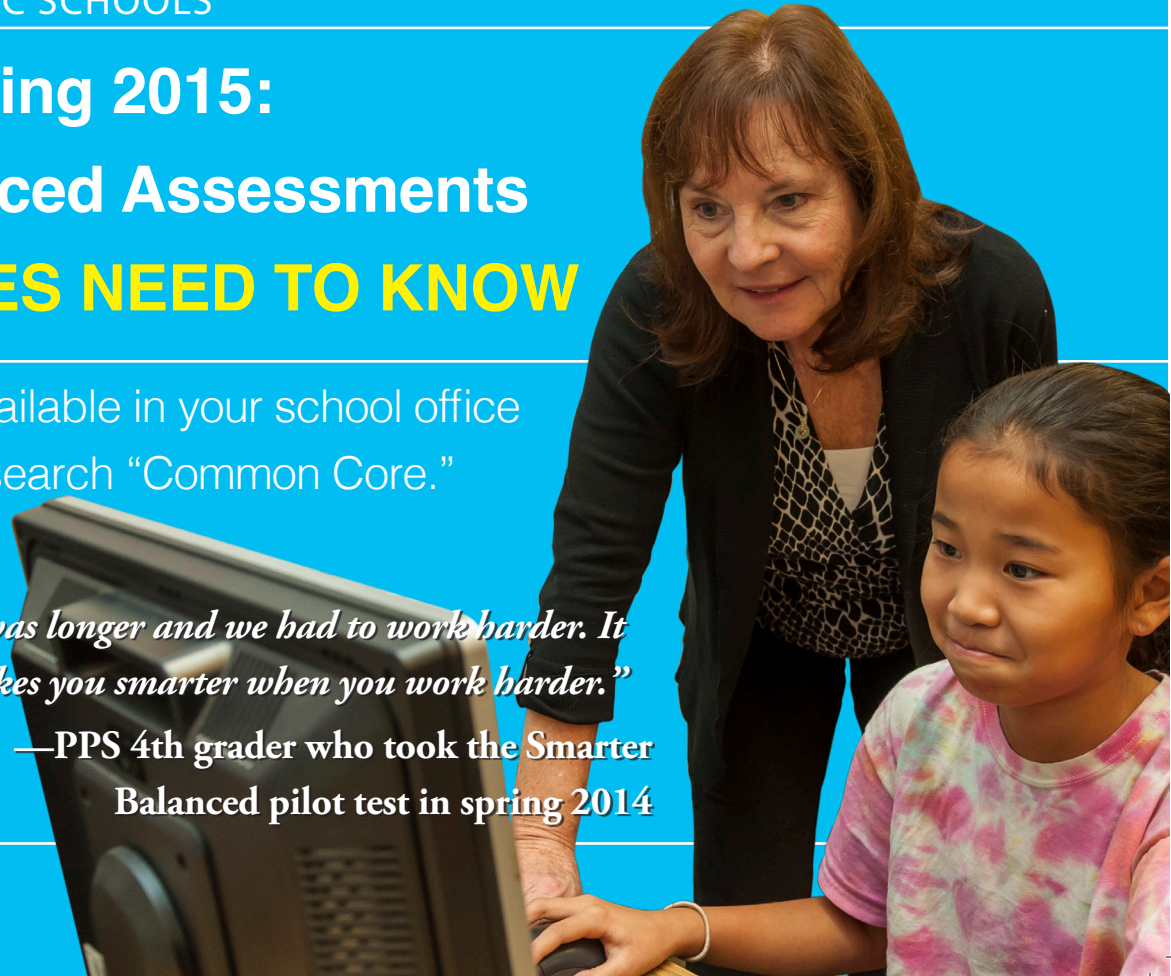
PORTLAND PUBLIC SCHOOLS

# Coming in Spring 2015: Smarter Balanced Assessments **WHAT FAMILIES NEED TO KNOW**

More information is available in your school office  
and at [www.pps.net](http://www.pps.net), search “Common Core.”

*“It was longer and we had to work harder. It  
makes you smarter when you work harder.”*

—PPS 4th grader who took the Smarter  
Balanced pilot test in spring 2014





# Smarter Balanced Assessments

## *Informing learning and growth*



Portland Public Schools  
501 North Dixon Street  
Portland, OR, 97227-1807

### Winter/Spring 2015

This spring, students across the state will take a new test called **Smarter Balanced** to measure how well they are mastering new academic standards. Oregon adopted the new **Common Core State Standards** in 2010 to better prepare students for college and career.

**Who:** Students in grades 3-8 and 11 will take the tests in math and English language arts. The new tests replace the standardized tests students currently take.

**Why:** The tests measure what students have learned and where support is needed. Eleventh graders must “pass” the tests to graduate – or use an alternate method.

**When:** Schools set test dates in these time frames:

- **3-8th graders:** March 10 - June 5.
- **11th graders:** April 22 - June 5.

**What:** Instead of only multiple-choice questions, the new tests use videos and illustrations that help students apply their knowledge and critical thinking skills.

**Length:** On average, 3.5 hours for each of the two tests. Tests taken once not multiple times. Avoids repeated disruption of class time.

**View sample questions:** [www.smarterbalanced.org/sample-items-and-performance-tasks](http://www.smarterbalanced.org/sample-items-and-performance-tasks)

**Take a practice test:** <http://sbac.portal.airast.org/practice-test>



## College and Career Ready: Smarter Balanced Assessments coming this spring

Winter/Spring 2015



### Informing learning and growth

This spring, students in Portland Public Schools and across the state will take a new test called **Smarter Balanced** to measure how well they are mastering new academic standards.

Oregon adopted the new academic standards, called **Common Core State Standards**, in 2010 to better prepare students for college and career. These standards, adopted by dozens of states across the country, reflect what students need to know and be able to do to be competitive in a global economy and are more rigorous than the standards we had in the past.

### Who, what, when and where:

- **Who:** Students in grades 3-8 and 11 will take the Smarter Balanced tests in math and English language arts (reading, writing). These tests will replace the Oregon Assessment of Knowledge and Skills (OAKS) tests in these subject areas.
- **Why:** The new tests measure how much students are learning and where support is needed. Most 11th graders use the tests to meet graduation requirements.
- **When:** Each school sets the specific test dates within these time frames:
  - » **3-8th graders:** March 10 - June 5.
  - » **11th graders:** April 22 - June 5.
- **What:** Instead of only multiple-choice questions, the new tests also use videos and illustrations that help students apply their knowledge and critical thinking skills to real-world situations.
- **Test length:** On average, students take 3.5 hours to complete each test. They do not take the tests in one sitting. They only take the test once, not multiple times as was done with OAKS, decreasing interruptions to class time. Schools create testing conditions —within state guidelines—that support students to do their best work.
- **Test development:** Thousands of teachers, including more than 500 from Oregon, helped develop the tests. Students in 21 states—including 24,000 in Oregon—took a practice test to ensure the test’s accuracy and fairness.

### Every student should know how to:

- Reason
- Analyze
- Listen
- Collaborate
- Read, Write, Speak
- Compute
- Use Technology
- Design Solutions

*These skills—and many others—are a part of the Common Core Standards and are the “competencies” that the Smarter Balanced test measures.*

“It was longer and we had to work harder. It makes you smarter when you work harder.”

—PPS 4th grader who took the Smarter Balanced pilot test in spring 2014

**View sample questions:** [www.smarterbalanced.org/sample-items-and-performance-tasks](http://www.smarterbalanced.org/sample-items-and-performance-tasks)

**Take a practice test:** <http://sbac.portal.airast.org/practice-test>

### Are the new tests harder?

The tests may seem more difficult because they require students to think more critically and it’s harder to guess the answer. Test scores may drop at first because the expectations are higher to reflect what kids need to know today.

- **What if a student “fails” the test:** Students meet, exceed or do not meet the state benchmark on each test.
  - » **Grades 3-8:** The test results are *NOT* used to “hold students back.” They are used to adjust instruction so that students learn what they need to know.

## COLLEGE AND CAREER READY: SMARTER BALANCED ASSESSMENTS COMING THIS SPRING

- » **Grade 11:** Most 11th graders use the test to show that they have mastered the subjects that the state requires for graduation. Students do this by earning a passing score on each test. The state may adjust the passing score to give students and schools time to adjust to the new tests. This passing score **may be lower** than the score required to “meet” the benchmark. If students do not earn a passing score, they must use an alternate method, such as work samples, to demonstrate their knowledge in order to graduate.
- **Students with special needs:** The test is given in English, which was also the case with the OAKS tests. The test includes supports for students who are learning English and/or have an Individualized Education Plan (IEP). Supports include such tools as a translated glossary for English language learners, a scratch pad, Braille and closed captioning. Teachers determine which tools students need. Learn more: [www.smarterbalanced.org](http://www.smarterbalanced.org)

### How can I support my student to do their best on the test?

- Take a practice test with your student: <http://sbac.portal.airast.org/practice-test>
- Make sure a student is rested and has had enough to eat on test day.
- Emphasize your belief in your child and encourage him or her to do their best.
- Concerned about your child’s preparedness for testing? Talk with the teacher or principal.

### Do we have the technology?

Most schools have the computers needed for students to take the tests. PPS is conducting an inventory and will provide additional computers to schools as needed.

### Can students choose not to take the tests?

- **Exemptions:** State law allows for parents to exempt students from the tests for only two reasons: disability or religious reasons.
- **Request:** The parent or guardian must fill out an exemption form in the school office, citing a disability and/or a religious reason that precludes their child from testing. No other reasons are accepted as valid by the state.
- **Learning activity:** The parent is also asked to propose a learning activity that the child can complete instead of taking the test, such as a special project that covers math and/or reading skills that would be assessed in the tests.

### What happens if students do not take the tests?

- **Progress report:** Students who do not take the tests miss out on the progress report that the tests provide, which helps schools and families understand how much students are learning and where to adjust instruction or supports.
- **School ranking:** The state uses test participation to rate schools. Students who do not take the tests count against their school’s rating on the state report card.
- **Graduation:** Eleventh graders use the tests to demonstrate mastery of graduation requirements. Students who do not take the tests must use an alternate method to demonstrate mastery in order to graduate.
- **Equity:** For students who have been historically underserved and may already face barriers to academic success, not taking the tests can compound these barriers, especially in 11th grade when students use the tests to meet graduation requirements.

### What students say:

PPS 3<sup>rd</sup> and 4<sup>th</sup> graders who took the practice pilot test in spring 2014 said:

“It was fun; we had to read different sources and create an essay.”

“New test is better because we have to type, not just fill in bubbles.”

“Teachers need to teach typing skills and kids need to practice typing.”



Learn more: [www.pps.net](http://www.pps.net), search “Common Core.”



# College and Career Ready: Common Core State Standards and Smarter Balanced Assessments

Portland Public Schools is focused on student success and preparing all students for college and career in a global economy. Academic standards help set the bar for success and testing measures how well students are meeting that bar.

## What to expect in 2014-15:

- **New teaching strategies to support new standards:** All schools are learning teaching strategies to support the Common Core State Standards in math and English-Language Arts, which PPS began implementing in 2011.
- **New tests:** This spring, PPS students in grades 3-8 and 11 will take new state math and English-Language Arts tests. The Smarter Balanced Assessments will replace the Oregon Assessment of Knowledge and Skills tests in these subject areas. (The science test will change when the new science standards are fully implemented.) (See flip side)

## Common Core State Standards

The Common Core State Standards (CCSS) lay out what students should know and be able to do at each grade level K-12 in English-Language Arts and mathematics. Oregon adopted the standards in 2010. PPS began implementing them in 2011-12.

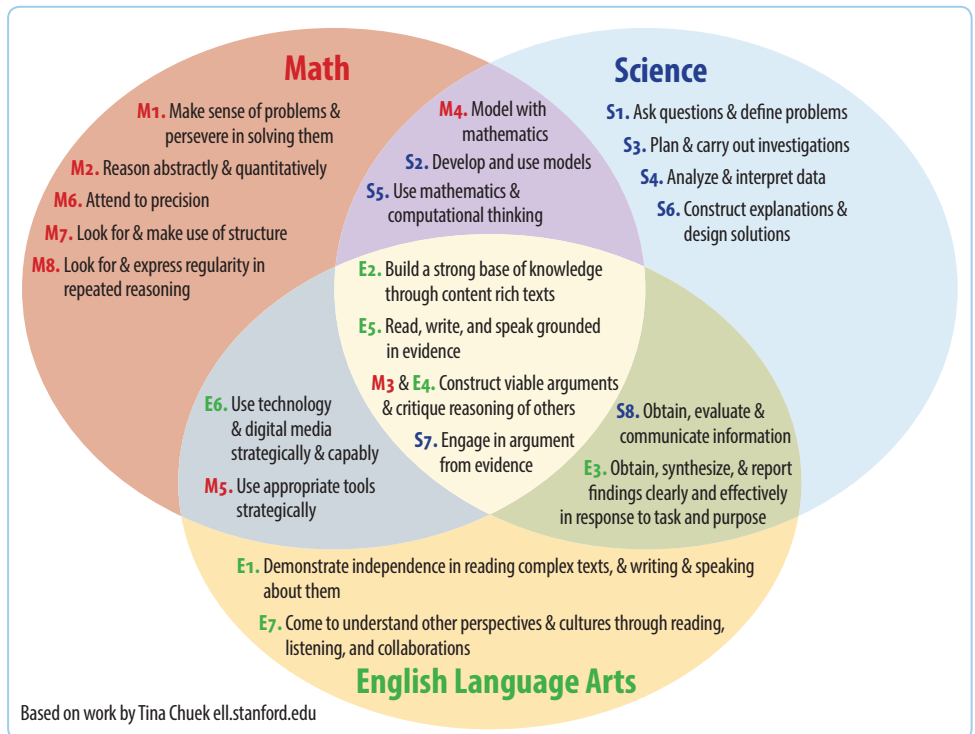
### How are these standards different?

Oregon has had academic standards for years. However, the previous standards did not adequately prepare our students for our rapidly changing economy and many students need remedial courses in college, relearning content they should have mastered in high school.

The new standards shift some content—such as certain algebraic concepts - to earlier grades so that students can be prepared for credit-bearing coursework in college. They also place greater emphasis on other content - such as non-fiction texts - to better reflect the skills needed in college and careers.

The Common Core also includes habits of mind of successful learners. These practices support critical thinking skills that apply to many areas of study, career and life situations.

(See diagram right)



### Do the standards tell teachers what to teach?

No. The Common Core Standards, for example, say that students should be able to analyze a text and use examples from the text to demonstrate comprehension. Portland Public Schools determines the learning materials that teachers will use and teachers also bring their expertise and creativity to engage their students.

### How can I support my student's progress in school?

Support your child to attend school and to complete assignments. If possible, check in with the student's teacher to see how your child is doing and what additional support may be needed. Parent/teacher conferences in October are an important opportunity to get an update on your child's progress. If a child is struggling, ask the teacher if there are other district programs or specialists who could help.

## Smarter Balanced Assessments

### Are there new state tests to go with the new standards?

Yes. PPS – and schools across Oregon – will shift this spring from the Oregon Assessment of Knowledge and Skills (OAKS) tests to the Smarter Balanced Assessments, designed to measure if students are learning the new standards. Students in grades 3-8 and 11 will take the new tests this spring in math and English-Language Arts. **Parents will receive more information closer to the time of the tests.**

### Are the new tests harder?

The Smarter Balanced tests may initially seem more difficult because the tests go beyond multiple-choice questions. The tests are more interactive and engaging - using short videos or written passages, for example, and posing open-ended questions to which students type in answers. Accommodations and appropriate supports are provided to students learning English and/or who have other special needs. Test scores will likely drop until students and teachers adjust to the new tests. However, the tests are an important tool for improving student achievement and helping schools prepare students for college and careers.

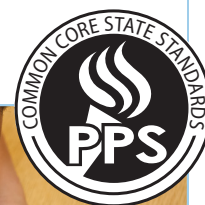
### How are the new tests scored?

Students either fail to meet, meet, or exceed the benchmark, as was done with the OAKS tests. Then as now, test developers invite the public - including educators and industry leaders - to weigh in on how high a student must score to “meet” and “exceed” the benchmarks.

### What happens if a student fails to meet the benchmark?

In grades 3-8, a student’s performance on the tests helps teachers and parents know the areas where a student needs to focus and whether the student is on track to meet the Essential Skills the state requires for graduation once they get to high school. Taking the tests in the lower grades familiarizes students with the tests. When they reach high school, they are then able to take the state test to show what they’ve learned and earn their high school diploma.

Test results also help state and federal officials determine if schools and school districts are meeting the learning needs of all students. This is one reason why it’s important for all students to take the tests. The state docks the overall rank of a school if fewer than 95 percent of students take the tests at each grade they are offered.



## Resources and links

- **PPS Common Core webpage:** [www.pps.net](http://www.pps.net) ; search “Common Core.”View links to:
  - › The standards themselves.
  - › Parent toolkits in English and Spanish.
  - › Debunking myths about the Common Core.
- **Smarter Balanced:**
  - › **Learn more:** [www.smarterbalanced.org/smarter-balanced-assessments](http://www.smarterbalanced.org/smarter-balanced-assessments)
- **Examples of test questions:**
  - › [www.smarterbalanced.org/sample-items-and-performance-tasks](http://www.smarterbalanced.org/sample-items-and-performance-tasks)
- **What students say:** PPS 3rd and 4th graders who took the Smarter Balanced Field Test last spring shared their experience:

“It was fun; we had to read different sources and create an essay.”

“I like typing instead of filling in bubbles.”

“It was longer and we had to work harder. It makes you smarter when you work harder.”

“New test is better because we have to type, not just fill in bubbles.”

“Teachers need to teach typing skills and kids need to practice typing.”





## Standardized testing in schools: Information for Families

Standardized testing in schools is frequently a topic of public discussion. Portland Public Schools would like your family to be fully informed about what standardized tests mean for your student and your school.

### A key learning tool

Oregon's statewide assessments (state tests) are taken by students in grades 3-8 and 11 to assess English-Language Arts, math and science.

Starting this spring, new tests – called Smarter Balanced Assessments – will replace the old Oregon Assessment of Knowledge and Skills tests in math and English-Language Arts. The new tests assess what students are learning under the new Common Core State Standards. New science tests will follow when PPS has fully implemented the Common Core State Standards in science.

### The Smarter Balanced tests:

- **Show how well students have learned the academic content and habits of mind** laid out in the Common Core State Standards that are designed to prepare students for college and careers. This information can help students, teachers and schools tailor instruction to be sure all students are learning what they need to learn.
- **Measure how well schools are serving students.** The state records test results for each student as well as for each school as a whole. The state also tracks how many students take the tests, requiring that 95 percent of a school's students take the tests at every grade the tests are offered. The state downgrades the ranking of schools at which not enough students take the tests. Families often use schools' test results and rankings when choosing where to send their children, and the school district and state use the information to decide which schools need specific attention or investment to raise achievement.
- **Are more engaging, interactive and "real-world" than previous tests** and help parents and students identify academic areas, skills or habits of mind that students need more practice on.

### A requirement for graduation

- In Oregon, students are required to show mastery in key areas to graduate from high school. Most high school students show mastery by meeting the benchmark on the state tests.
- Taking the tests in earlier grades prepares students to successfully show their mastery and meet graduation requirements in high school.
- Students are required to take the state tests unless they qualify for an exemption.

### Exemptions

State law allows for students to opt out of the tests for only two reasons: for disability or religious reasons. Parental permission is required for a student to opt-out of a test.

### Learn more

Learn more about testing, including student exemptions, at [www.ode.state.or.us/home](http://www.ode.state.or.us/home) or talk with the principal at your school. Learn more about the Smarter Balanced Assessments at [www.pps.net](http://www.pps.net), search "Common Core," or at [www.smarterbalanced.org](http://www.smarterbalanced.org).

If you have additional questions, contact Joe Suggs, Director of PPS Research, Evaluation & Assessment, [jsuggs@pps.net](mailto:jsuggs@pps.net) or 503-916-3341. Spanish, 503-916-3582. Vietnamese, 503-916-3584. Russian, 503-916-3583. Chinese, 503-916-3585. Somali, 503-916-3586.



## 2014-15 Parent Request for Exemption from Required Statewide Assessment(s)

*Under the state guidelines listed below, districts can choose whether to allow parents to exempt students from testing for religious or disability reasons. At this time, PPS allows requests for exemption only if this form is correctly completed and submitted prior to the start of testing for an individual student. This form should be completed only after school staff has reviewed with parents/guardians available accessibility options for testing and the impact of exemption on the student and the school.*

**OAR 581-022-1910:** “Parents may request that their student be exempted from state testing based on either disability or religion... In order for a school district to excuse a student from testing, the student’s parent must submit a written request to the school district, listing the reasons for the request and proposing an alternative individualized learning activity for the student that meets the same goals that would be accomplished by participation in state testing. Appropriate school personnel must evaluate and approve the parent request.

When reviewing a parent’s request for exemption, school district personnel should first discuss the use of accommodations with the parent to determine whether the use of any appropriate accommodations during testing might address the parent’s concerns and allow the student to participate in state testing. **Students who are enrolled in school during the statewide test window who are not tested due to a parent-requested exemption must be counted as nonparticipants.**” (2014-15 Test Administration Manual, p. 44)

**Parents should note:** State tests are used to rate schools – both on how well students do overall and on how many students take the tests. If a school falls below 95% participation, the school’s state rating falls. The rating, reported publicly in the school’s State Report Card, are used by families weighing school choices.

Student name: \_\_\_\_\_ Student ID #: \_\_\_\_\_

School name: \_\_\_\_\_

I am requesting that my student be exempt from the following required state assessments for the 2014-15 school year:

- |  |  |   |
|--|--|---|
| <input type="checkbox"/> English Language Arts | <input type="checkbox"/> Mathematics             | <input type="checkbox"/> Science              |
| <input type="checkbox"/> ELPA                  | <input type="checkbox"/> Kindergarten Assessment | <input type="checkbox"/> Extended Assessments |

Briefly describe your reason for requesting this exemption (one or both boxes must be checked):

- Religious reasons: \_\_\_\_\_
- Disability reasons: \_\_\_\_\_

I have attached a copy of my proposal of an alternative individualized learning activity for my student. (Required)

\_\_\_\_\_  
 Parent/guardian signature

\_\_\_\_\_  
 Parent/guardian name (please print)

\_\_\_\_\_  
 Date

School use only      Approved by: \_\_\_\_\_      Date: \_\_\_\_\_

**Remember to forward a copy of this page to Research, Evaluation & Assessment**  
*It is the school’s responsibility to ensure that students with approved exemptions are not tested in exempted subjects.*

## Portland Public Schools

### Count of *students* for which parents requested exemptions for 2014-15

As of 4 February 2015

#### Total Count (Valid\* and Invalid)

Grade	# Requests
KG	14
2	2
3	6
5	6
6	4
7	1
10	1
11	1
Total	35

#### Total Count (Valid\* Only)

Grade	# Requests
KG	14
2	2
3	6
5	5
6	4
7	1
11	1
Total	33

\*A Valid request is a exemption request where the assessment is appropriate for that grade level  
A math or ELA test at grade 2, or example, is not a valid request.

### Count of *tests* for which parents requested exemptions for 2014-15

As of 4 February 2015

Test	KG	Grade 2	Grade 3	Grade 5	Grade 6	Grade 7	Grade 10	Grade 11	Total	Valid Total
Math	5	2	5	5	4	1	1	1	24	16
ELA	5	2	6	5	4	1	1	1	25	17
Science	5	2	6	5	3	0	1	1	23	15
ELPA	5	2	5	5	4	0	0	0	21	21
Extended	5	2	3	4	3	0	1	0	18	10
Kinder	14	1	3	1	0	0	0	0	19	14
NAEP	1	1	2	5	3	0	0	0	12	0

Note: Shaded cells are boxes that were checked on exemption forms but those grades are not tested on those assessments.  
The Valid Total column shows total test exemptions where the grade and test combination are valid.





# Board of Education Informational Report

## **MEMORANDUM**

**Date:** February 17, 2015  
**To:** Members of the Board of Education  
**From:** Ewan Brawley, Sr. Director, Instruction, Curriculum & Assessment  
**Subject:** Assessment Advisory Committee Update

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### **Background**

This memorandum provides information related to the formation of a PPS Assessment Advisory Committee. This purpose of this committee is to establish a shared vision for the role of assessment in the teaching and learning process, provide guidance for the development of a district framework for district assessments, and help inform a professional development plan that supports student learning and improves outcomes for all students.

Committee members are composed of classroom teachers, building administrators and staff from the Office of Teaching and Learning. (Attachment A) The committee will also hear testimony and input from students, parents and community members. Dr. Rick Stiggins, founder of the Assessment Training Institute and author of many books and articles on assessment, is a frequent participant and advisor to the committee.

### **Goals and Objectives**

In addition to developing a cohesive vision for assessment in PPS, the committee has agreed upon the following objectives for our work:

- Conduct and analyze an audit/inventory of required district assessments from a student perspective
  - Identify the information that is needed from district assessments and the intended users of that information
  - Identify grade levels/periods of time/subjects where students may be overburdened with too many required assessments
- Make recommendations on a professional development plan to support assessment literacy for teachers and administrators
- Make recommendations to develop a district assessment framework to support needs of students and the various users of assessment information
- Make recommendations, as needed, on measures of success for district milestones and achievement compacts

## **Progress to Date**

During initial meetings the group has established a shared set of definitions and understandings of assessment. Dr. Stiggins has provided a lens through which we can evaluate our needs (Attachment B) and existing assessments summarized by the following questions:

- What are the key decisions to be informed?
- Who is the decision maker?
- What information do they need?
- What are the essential conditions?

Staff from OTL and Systems Planning and Performance has completed the audit of required district and state assessments. This data has been presented to the assessment committee (Attachment C) and they have begun the process of identifying gaps, redundancies and areas of over testing.

Staff will also be sharing data from a fall 2014 survey conducted by the Council of Great City Schools with the assessment committee. This survey provides some valuable comparative data from other Council districts that, when used in conjunction with audit data, will provide additional insights into the testing load on students.

## **Governor's New Path for Oregon Assessment**

On February 9<sup>th</sup> a state-level advisory council released A New Path for Oregon: System of Assessment to Empower Meaningful Student Learning. (Attachment D) Dr. Nancy Golden, Oregon's Chief Education Officer, and Hanna Vaandering of the Oregon Education Association led this group. A window for feedback on these documents is open until March 31. The PPS Assessment Advisory has begun to review these documents and hear directly from its representatives. As a committee we will provide feedback and determine how this work will inform our goals and objectives.

## **Summary**

This committee represents a valuable partnership between teachers, staff and community experts to deepen our understanding of the role of assessment to support student learning and engagement. This committee will continue to meet until June, at which time we will evaluate the need for further work to be carried into the 2015-16 school year.

## Assessment Committee Members

Name	Role
Ewan Brawley	Sr. Director of ICA
Angela Hubbs	Asst. Director of ICA
Alma Velasquez	DLI TOSA
Diana Kruger	RTI Coordinator, Vernon K-8
Sara Hotchkiss	Instructional Coach, Jason Lee
Chris Riser	Teacher 6-8, Woodlawn
Tom Kane	HS SS/LA, Alliance @ Meek
KD Parman	Science Teacher, Roosevelt HS
Ayesha Freeman	VP, Wilson HS
Klarissa Hightower	ESL TOSA
Amy Angell	SPED Teacher, Lane MS
Emily Glasgow	Principal, Vestal
Amy Kleiner	Principal, Sunnyside Env.
Amy Slaughter	Math TOSA
Elizabeth Martin	ELA TOSA
Rick Stiggins	Technical Advisor
Joe Suggs	Director Research & Evaluation
Regina Sackrider	Program Director, CARE
Gwen Sullivan	President, PAT
Jessica Bucknam	DLI Teacher, King
Joe Ballman	Math teacher, Jefferson HS
Vân Truong	Sr. Director of OTL
Daniel Cogan	TOSA, Office of School Performance
Ruben Estrada	Senior, Grant High School

## Essential Components of a Balanced Local District Assessment System

Level of Assessment and Key Issues	Formative Applications	Summative Applications
<p><b><i>Classroom assessment</i></b></p> <ul style="list-style-type: none"> <li>○ <i>Key decision(s) to be informed?</i></li> <li>○ <i>Who is the decision maker?</i></li> <li>○ <i>What information do they need?</i></li> <li>○ <i>What are the essential assessment conditions?</i></li> </ul>	<p>What comes next in the student’s learning?</p> <p>Students and teachers</p> <p>Evidence of where the student is now on learning progression leading to each standard?</p> <ul style="list-style-type: none"> <li>• Clear curriculum maps per standard</li> <li>• Accurate assessment results</li> <li>• Descriptive feedback</li> <li>• Results point student and teacher clearly to next steps</li> </ul>	<p>What standards has each student mastered? What grade does each student receive?</p> <p>Teacher</p> <p>Evidence of each student’s mastery of each relevant standard</p> <ul style="list-style-type: none"> <li>• Clear and appropriate standards</li> <li>• Accurate evidence</li> <li>• Focus on achievement only</li> <li>• Evidence well summarized</li> <li>• Grading symbols that carry clear and consistent meaning for all</li> </ul>
<p><b><i>Interim/benchmark assessment</i></b></p> <ul style="list-style-type: none"> <li>○ <i>Key decision to be informed?</i></li> <li>○ <i>Who is the decision maker?</i></li> </ul>	<p>Which standards are our students not mastering? Where can we improve instruction right away? Which students need specific help?</p> <p>Instructional leaders; Learning teams; Teachers</p>	<p>Did the program of instruction deliver as promised? Should we continue to use it?</p> <p>Instructional leaders</p>

<ul style="list-style-type: none"> <li>○ <i>What information do they need?</i></li> <li>○ <i>What are the essential conditions?</i></li> </ul>	<p>Any standards students are struggling to master</p> <ul style="list-style-type: none"> <li>• Clear and appropriate standards</li> <li>• Accurate assessment results</li> <li>• Results reveal how <i>each</i> student did in mastering <i>each</i> standard</li> </ul>	<p>Evidence of mastery of standard</p> <p>Accurate assessments of mastery of program standards aggregated over students</p>
<p><b><i>Annual testing</i></b></p> <ul style="list-style-type: none"> <li>○ <i>Key decision(s) to be informed?</i></li> <li>○ <i>Who is the decision maker?</i></li> <li>○ <i>What information do they need?</i></li> <li>○ <i>What are the essential assessment conditions?</i></li> </ul>	<p>Which standards are our students mastering/not? Where and how can we improve instruction over the long term?</p> <p>Curriculum &amp; instructional leaders</p> <p>Standards students are struggling to master</p> <p>Accurate evidence of how <i>each</i> student did in mastering <i>each</i> standard aggregated over students</p>	<p>Are enough students meeting standards?</p> <p>School and community leaders</p> <p>Percent of students meeting <i>each</i> standard</p> <p>Accurate evidence of how <i>each</i> student did in mastering <i>each</i> standard aggregated over students</p>

Rick Stiggins  
 Assessment Consultant  
 Lake Oswego OR

**Portland Public Schools**  
**2014-15 Required Assessment Inventory**

All Students  
 ELL Students  
 EB (DLI) Students

TAG Students  
 Other Select Students/Schools

Assessment	Jul.	Aug.	Sep.	Oct.	Nov.	Dec.	Jan.	Feb.	Mar.	Apr.	May	Jun.	Grades	
DIBELS/DIBELS Next			10 mins.				10 mins.					10 mins.	K-3	
IDEL			10 mins.				10 mins.					10 mins.	K-3	
easyCBM			1 min/std				1 min/std					1 min/std	4-8	
Vietnamese CBMs			10 mins.				10 mins.					10 mins.	K-5	
Mandarin CBMs			10 mins.				10 mins.					10 mins.	K-5	
Russian CBMs			10 mins.				10 mins.					10 mins.	K-5	
Japanese CBMs			10 mins.				10 mins.					10 mins.	K-5	
Performance Series (pilot in 9 schools)			60 mins.				60 mins.					60 mins.	K-8	
Compacted Assessment of Readiness (CAR)									60 mins.				6	
OAKS Science							60+ mins. (grades 5, 8, 11)					5, 8, 11		
Smarter Balanced Summative								6-8 hrs. (or more)					3-8, 11	
ELPA							75 mins.					K-12		
Oregon Kindergarten Assessment			15 mins.										K	
NAEP							60-90 mins.					4, 8, 12		
TIMSS									60-90 mins.				4, 8, 12	
<i>Advanced Placement</i>									3 hrs/subj.				10-12	
<i>International Baccalaureate</i>									3 hrs/subj.				11-12	
SAT									3-4 hrs.				11-12	
PSAT				2 hrs.									10	
ACT									4 hrs.				11-12	
CogAT (screener)			60 mins.										2	
CogAT (full)					2 hrs.								K-12	
ITBS					2 hrs.								K-12	
ADEPT				30-60 mins.			30-60 mins.			30-60 mins.				K-12
STAMP			2 hrs.										4, 8, 11	
IPT			15-180 mins. (varies by students and language level)										K-12	
Local Performance Assessments (Work Samples)			6-8 hrs total (about 1-2 class periods per subject)										3-8, HS	



















DIBELS Next: The Dynamic Indicators of Basic Early Literacy Skills (DIBELS) are a set of research-based procedures and measures for assessing the acquisition of early literacy skills from kindergarten through third grade.

IDEL: A research-based formative assessment series designed to measure the basic early literacy skills of children learning to read in Spanish in kindergarten through third grade.

easyCBM: A computer-based formative and interim assessment system designed to provide immediate information on students' reading performance and progress in fourth through eighth grade.

Vietnamese CBMs: A screening tool created by Portland Public Schools that is designed to measure the basic early literacy skills of children learning to read in Vietnamese in kindergarten through second grade.

Mandarin CBMs: A screening tool created by Portland Public Schools that is designed to measure the basic early literacy skills of children learning to read in Mandarin in kindergarten through second grade.

Russian CBMs: A screening tool created by Portland Public Schools that is designed to measure the basic early literacy skills of children learning to read in Russian in kindergarten through second grade.

Japanese CBMs: A screening tool created by Portland Public Schools that is designed to measure the basic early literacy skills of children learning to read in Japanese in kindergarten through second grade.

Performance Series: A norm-referenced computer adaptive diagnostic test that will identify a student's instructional level, independent of enrolled grade level. *\*\*Currently piloted in nine PPS schools.\*\**

Compacted Assessment of Readiness: A sixty-minute constructed-response test used to determine the readiness of sixth grade students for subsequent mathematics instruction.

OAKS Science: Criterion referenced summative test written to the Oregon science standards. About a sixty-minute test administered to grades 5, 8 and 11. There is currently no accountability tied to this test but it is a required assessment.

Smarter Balanced Summative: This is one of the new, nationally developed summative assessments written to the Common Core State Standards. The assessment covers both English language arts and mathematics, is given to students in grades 3-8 and 11 and takes about 6-8 hours total (for both subjects).

ELPA: Oregon's English Language Proficiency Assessment (ELPA) is administered in grade bands for all ESL and recently ESL monitored students in grades K-12. The assessment takes 1-2 hours and includes writing, listening, speaking and constructed response items.

Oregon Kindergarten Assessment: This assessment includes easyCBM literacy measures (letter names and letter sounds), math items and a teacher survey to assess student Approaches to Learning. The test is given once at the beginning of kindergarten and is intended to measure student readiness for kindergarten.

NAEP: The National Assessment of Education Progress (NAEP) is a national standardized assessment given to a stratified sample of students across the nation in grades 4, 8 and 12. The test measures trends in reading and mathematics.

TIMSS: The Trends in International Mathematics and Science Study (TIMSS) is an international assessment and research project designed to measure trends in mathematics and science achievement at grades 4, 8 and 12 as well as collect information about school and teacher practices related to instruction.

Advanced Placement: The Advanced Placement examinations allow high school students to demonstrate mastery of Advanced Placement course material and potentially earn college credit with qualifying scores.

International Baccalaureate: The International Baccalaureate (IB) assesses student work as direct evidence of achievement against the stated goals of the Diploma Programme (DP) courses and allows students to earn college credit with qualifying scores.

SAT: The SAT is designed to measure a student's ability to understand and process elements in the areas of reading, writing, and math and serves as a strong indicator of academic success in college.

PSAT: The PSAT is designed to allow tenth grade students to receive feedback on their understanding of reading, writing, and math in preparation for the SAT as well as potentially qualify for the National Merit Scholarship program.

ACT: The ACT is a curriculum-based test designed to measure high school students' general educational development and their ability to complete college-level work.

CogAT: The Cognitive Abilities Test (CogAT) measures second grade students' learned reasoning abilities in the three areas (Verbal, Quantitative and Nonverbal) most linked to academic success in school and serves as an identifier of TAG status.

ITBS: The Iowa Test of Basic Skills (ITBS) is intended to provide a diagnostic at student learning in key areas such as vocabulary, word analysis, listening, reading comprehension, math and other areas.

STAMP: STAMP (STAndards-based Measurement of Proficiency) is a web-based test that assesses foreign language proficiency and is used for DLI program evaluation.

IPT: Nationally normed language proficiency assessment that evaluates students' oral, reading, and writing proficiency and is used to identify students for ESL services.





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# A New Path for Oregon: System of Assessment to Empower Meaningful Student Learning



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*Governor Kitzhaber's Office*

*Oregon Education Investment Board*

*Oregon Education Association*

*Oregon Department of Education*

***Working Document***

*February 2015*

# Acknowledgments

Governor John Kitzhaber requested Dr. Nancy Golden, Chief Education Officer, Oregon Education Investment Board (OEIB) to convene a group of teachers from the Oregon Education Association (OEA), to collaborate with the Governor's Office, the OEIB and the Oregon Department of Education (ODE) to propose an "ideal" system of assessment which makes sense for both students and educators. This document is the result of the work of educators from across Oregon who have given countless hours learning together and sharing their expertise as classroom teachers and school district advisors in proposing a different way to assess Oregon students. Their commitment to helping each and every student in their classrooms and schools learn, grow and realize their full potential is reflected throughout this proposal. We are forever grateful to Dr. Rick Stiggins for the expertise, guidance and support throughout the development of this proposal. He truly helped each of us envision the possibilities of an assessment system that supports learning.

<b>Facilitators:</b>	Dr. Nancy Golden, Oregon's Chief Education Officer Hanna Vaandering, President, Oregon Education Association
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# A New Path for Oregon

## System of Assessment to Empower Meaningful Student Learning

### *Working Document*

## Executive Summary

Good education inspires students' natural curiosity and supports their desire to learn. When utilized to its full potential, good assessment can do the same. This new proposed system of assessment will increase time for learning, emphasize the use of assessment in support of learning, and rely on the most authentic balance of assessments to encourage student success. When we believe all students can learn, and we create systems of support and provide appropriate tools to encourage their success, we will finally move toward the future that all Oregon students deserve.

### *A Time of Opportunities and Possibilities*

Governor John Kitzhaber requested Dr. Nancy Golden, Chief Education Officer, Oregon Education Investment Board (OEIB) to convene a group of teachers from the Oregon Education Association (OEA), to collaborate with the Governor's Office, the OEIB and the Oregon Department of Education (ODE) to propose an "ideal" system of assessment which makes sense for both students and educators. The process of developing such a vision began with a team of teachers articulating a set of values and beliefs that should underpin the uses of assessment. Those involved agreed that assessments need to support student learning - the need to balance *assessment for learning* (i.e. formative assessment) and *assessment of learning* (i.e. summative assessment) in the future is critical for student success.

While advocating for an increase of *assessment for learning* we understand that different decision makers (e.g. students, parents, teachers, principals, superintendents, school board members, community members, policy makers, etc.) need different kinds of information about student learning in different forms at different times if they are to make their unique contributions to supporting student success. No single quality assessment can meet all needs, and thus this proposal looks at balancing the following assessment sources:

- Continuous evidence from classroom assessment to support student learning;
- Periodic evidence supplied by progress monitoring and interim benchmark assessments; and
- Results of annual assessments to verify what has been learned.

This balance acknowledges that using tests that happen once a year, while helpful in setting resource priorities, are of little value to those who must make instructional decisions every three or four minutes - our students and our teachers.

The future effectiveness of assessment in Oregon schools and student learning will rely on our ability to move from an assessment system historically devoted to summative applications using annual test scores to meet the needs of all the users to one that clearly defines the type of assessment and the appropriate use of the assessment for student engagement in learning. The key to this transition and to the success of the new system of assessment is for all stakeholders to develop and continually foster assessment literacy. Assessment literacy is the ability to understand the assessment process in order to best meet the needs of students. It is also the method of gathering accurate information about student learning and using the assessment cycle and its results effectively to improve student learning and success.

### *A New Vision of Excellence*

In order to achieve balance and excellence in our system of assessment, those engaged in this reflective process propose a new vision that weaves assessment more deeply than ever before into the teaching and learning process. Used appropriately, assessment can be a powerful tool to help both teachers and their students know where they are now in their learning progression and determine where students need to go next. With consistent ongoing teacher support and engaged students, *assessment for student learning* can provide individualized support to meet the needs of each learner. Therefore, we recommend a new vision based on following guiding principles:

- All assessments must arise from and promise to serve a clear purpose.
- They must be designed and developed to reflect developmentally and academically appropriate learning targets.
- Each assessment must accurately reflect student learning.
- Results must be effectively communicated to all intended users.
- Our mission must be to use assessment to encourage students to keep striving for learning success.

### *Transition to the New Vision*

Transitioning to a new system of assessment requires time and collective work among education stakeholders and communities across Oregon. We hope you find this proposal as a place to start thinking about the actions necessary to transition from an

assessment system that relies too heavily on summative, standardized assessment to a new system in which assessment and learning work together for students' benefit, one in which all educators and stakeholders become assessment literate, and every Oregon student can reach his or her full potential. In the words of Chappuis (2009).

*"Assessment for learning is a gift we give our students. It is a mirror we hold up to show them how far they have come. It is a promise that we will use assessment, not to punish or reward, but to guide them on their learning journey."*

# A New Path for Oregon

## System of Assessment to Empower Meaningful Student Learning

*Working Document*

### Introduction: A Time of Opportunities and Possibilities

*“Used with skill, assessment can motivate the reluctant, revive the discouraged, and thereby increase, not simply measure, learning and achievement” (Chappuis, Stiggins, Chappuis & Arter, 2012).*

Good education inspires students’ natural curiosity and supports their desire to learn. But good education can only occur in the presence of sound assessment practice—and that in turn begins with the recognition that students are individuals with diverse needs.

Acknowledging that not all students fit into the same mold and may not follow the same path to learning success frees us to accommodate learning differences and thus help every student fulfill his or her highest potential. Such differentiation requires attention to language differences, cultural diversity, learner rights inherent in Individualized Education Plans, or any other academic or social emotional support needed to foster student success. We must meet each student at his or her current level, understand where that student is excelling—or struggling—and identify what each student needs to take the next step. Such a tailored approach demands the skillful application of sound assessment practices at all levels and by all educators.

At this moment in time, Oregon has the opportunity to improve its assessment system by creating local and state practices that truly support universal learning success. Empowered by state leadership, Oregon educators have teamed up to propose a dynamic new way of assessing student performance, one that makes learning meaningful for both students and educators, shows how students’ academic success can soar when assessment is made an integral component of instruction, and provides a system of support for educators to facilitate this success.

The new Oregon model of assessment proposed herein will increase time for learning, emphasize the use of assessment to support that learning, empower students and teachers, increase assessment literacy among all educators—as well as parents and the broader community—and make assessment more efficient by ensuring that assessment and instruction are aligned.



The goal of this proposal is to open the doors to the following possibilities:

- Moving away from our historic over-emphasis on summative standardized assessment.
- Renewing focus on the classroom, where the majority of assessment affecting students' daily lives actually occurs.
- Creating a foundation of, and ongoing support for assessment literacy for all assessment users.

## Values and Beliefs: Assessment as a Foundation for Student Learning

Any strong assessment system must rest on a foundation of values regarding assessment itself and the role it can and should play in fostering learning, supporting users, and improving educational opportunities for students. The following values and beliefs provide the foundation for this proposal.

**All students can learn and realize their full potential.** The future of Oregon's assessment practices must embody the belief that all students can learn and achieve at high levels when assessments are used appropriately. College or career readiness requires that students become lifelong learners who can read, write, solve math problems and engage in critical thinking. However, a one-size-fits-all approach to assessing such skills serves no one because it provides only limited information about individual performance and progress. A successful system of assessment is not designed simply to highlight problems or to generalize about groups while ignoring conditions that influence performance. Instead, a successful system of assessment recognizes the myriad strengths of various learners within their respective communities and within the collaborative nature of the classroom. In addition, such a system is culturally sensitive and implemented by educators who are assessment literate. It can also serve multiple purposes, giving us information not only about students themselves, but also about the effectiveness of the schools and districts that serve those students. Such information, in turn, can help us create improvements that expand learning opportunities for all.

**Assessments must support or verify student learning.** All assessments must address a pre-established need for information and provide evidence that is dependable, instructionally useable and accessible to intended users. Assessments serve two general purposes: (1) they inform and enhance teaching and learning, or (2) they verify or certify the level of student learning. Both purposes are important but they

are different. The first takes place during learning and second takes place after learning has occurred. Any assessment that does not serve one of these purposes should not be conducted. Further, users should have a clear purpose in mind before determining what sort of assessment to choose or administer.

**Assessments must inform all important users.** Students must be seen not merely as the subjects of assessment, but as important members of the assessment user network. Traditionally, assessment has been seen as something teachers and school leaders *do to students*. This is unfortunate because assessment has far more power to influence learning when educators help students understand where they are at any given time in their journey toward success. Seeing how far they have come and what steps remain can be highly motivating. It makes students aware of their progress and growth, and this awareness gives them confidence. It also shows them where they are headed, thus making them feel in control of their learning. And finally, it shows which goals are within immediate reach, making progress feel manageable, and giving students the motivation and encouragement they need to overcome challenges and continue their efforts.

Student success depends on decisions made by numerous individuals and groups, among them parents, teachers, principals, superintendents, school board members, community members, policy makers, and of course, the students themselves. It's important to recognize that these various decision makers need different kinds of evidence in different forms at different times if they are to make their unique contributions to student learning. No single assessment can meet all of their informational needs. Depending on the context, assessment users may require—

- Continuous, ongoing evidence from *classroom assessment*
- Periodic evidence supplied by progress monitoring and *interim benchmark assessments*
- Results of *annual assessments* to verify what has been learned over a given period

While day-to-day classroom assessment has the greatest impact on students' engagement in their own learning, assessment in many forms and at many levels will support decision making throughout a broader network.

**Assessment results must inform instructional goal setting.** All assessments must address clear instructional targets, show how close students have come to meeting their instructional goals, and help educators and students make sound decisions about next steps. Quality assessments must provide useable information on student performance that goes beyond mere summary test scores. Single scores are limited in their capacity

to inform us about student performance, and to understand why, we have only to consider how tests are constructed. Traditionally, assessments have clustered many standards together into groups or domains; test scores that reflect performance across these domains make it impossible for students or teachers to know which specific targets within the domain were or were not mastered. This means they don't help teachers know what comes next in the learning; they provide no instructionally actionable information. On the other hand, assessments built to give information about specific achievement standards or proficiencies offer far greater instructional value because they show teachers (and students) where students are excelling and struggling, and hence where to focus their efforts. Whenever possible, assessments should tell us how each student did with respect to each standard tested.

**Assessments must be valid, reliable, and unbiased.** Regardless of purpose, assessments must be valid (measuring what they intend to measure), reliable (measuring accurately time and time again), and unbiased (measuring learning equally regardless of cultural background). Anything less is not acceptable for Oregon's students. Only quality assessment has the potential to support individual growth for all students. To satisfy these standards of excellence, we must invest in immediate and long-term professional development in assessment literacy for Oregon educators.

**Local district assessment systems must become the priority.** Over the decades and even in current professional literature, accountability is defined in terms of state systems. This has created a narrowed focus on statewide assessments for public accountability. Yet, virtually all instructional decisions that affect teaching and learning (and promise to narrow achievement gaps, for example) are made at the local level by district instructional leaders, building leaders, classroom teachers and students. While some evidence that informs local decisions may come, in part, from assessments conducted outside the district (such as statewide tests), instructional responsibility resides with a community's educators. Local district assessment, therefore, must be the focus of any vision of excellence that hopes to improve student learning in Oregon.

**Assessing and tracking student growth must** be a priority. Traditionally, assessment has been seen as occurring *after* teaching as a way of measuring what students have learned. An alternative approach weaves assessment into teaching itself. The student and teacher work together to see where the student is along a continuum of success, and to determine what should come next. This initial assessment is followed by focused instruction, another check of achievement, more decisions about what to do next, more opportunities for learning, and so on in a cycle where instruction is always determined by assessment, and assessment has a real and *immediate* impact on instruction. Ongoing, continual assessment of student growth over time gives educators and students more frequent opportunities to adjust the course of learning to meet each

student's needs. Research has revealed that such an approach yields profound achievement gains, with the largest gains *accruing for struggling learners* (Black & William, 1998a; Black & William, 1998b). By following this approach, Oregon has the opportunity to ensure growth *for all students*.

In summary, the future of Oregon education must be built on a balanced assessment system that is capable of supporting student learning *and* verifying it, depending on the context. Such a balanced assessment system must—

- Confirm the belief that all students can learn and achieve at high levels;
- Serve a pre-set purpose and accommodate the informational needs of all decision makers (rather than occurring annually and serving only a few);
- Provide evidence of mastery on individual achievement standards, not merely a summative score spanning broad domains;
- Satisfy accepted criteria of assessment quality (e.g., all assessments must be valid, reliable, and unbiased);
- Communicate results in timely and understandable ways to intended users;
- Help educators and parents engage students in ongoing self-assessment, creating the confidence that only comes from helping to monitor their own learning and seeing success within their reach; and
- Reflect student growth over time as opposed to achievement status at a single point in time

## Contrasting Our Assessment Needs with Current Reality

Comparing our current assessment practices and priorities with the proposed values and beliefs articulated above reveals significant discrepancies between where we are now and where we could be. In order to get where we want to be, we need to address the following problems:

**Students are discouraged.** When classroom and large-scale assessment play their traditional role as a means of ranking and sorting students, major segments of our student population—particularly those who finish low in the ranking order—lose momentum, confidence, and motivation. These struggling learners may drop out of school or simply give up and thus wind up unprepared for higher education or career training. Recently, we have come to understand that this result affects more than the students themselves; it is society that loses in the long run, and both outcomes are unacceptable. Sound assessment practices can help turn this loss around.

**Unproductive use of resources.** In recent years, virtually all our assessment resources for school improvement have been invested in annual high-stakes standardized tests. The commitment to fixing schools by demanding higher annual test scores started with districtwide testing in the 1960s, extended to statewide applications in the 1970s, then to national assessment in the 1980s, and ultimately to international assessment in the 1990s. With the federal policy of *No Child Left Behind* passed in the early 2000s, the urgency and frequency of testing have only increased. The United States has invested billions of dollars in this ever-more frenzied testing over the past few decades, based on the belief that increased testing would drive school improvement. Yet opportunity gaps persist, graduation rates remain troubling, and when it comes to test scores, the U.S. ranks in the middle of the international pack. Unless our focus shifts to include new classroom assessment approaches, integrating assessment with instruction and making students partners in their own instructional process, student outcomes will not improve.

**Unmet information needs.** Our current reliance on accountability testing in which everyone must await the delivery and distribution of annual scores has left all decision makers (students, teachers, principals, parents, district leaders, community members, legislators, policy makers) without the information they need to support student learning. Standardized assessments happen once a year; students and teachers in the classroom make decisions every three to four minutes. Further, intermittent test results fail to meet the informational needs of instructional leaders working outside the classroom to support and improve student learning. These across-the-board results lack both the depth and frequency to make a serious difference.

**Lack of opportunity to develop assessment literacy.** With the over-emphasis on high-stakes, standardized assessments, effective assessments at the classroom level are often devalued. When that happens, there is less impetus to provide training that would enable educators to design quality assessments or use them in an effective and timely way. Given that teachers typically spend a third of their professional time engaged in assessment-related practice, the lack of opportunity for in-depth assessment training is troubling indeed (Stiggins & Conklin, 1992). Almost without exception, teachers lack the allotted time to access this learning even if it were available. To compound the problem, relevant assessment training is extremely limited in most pre-service teacher or administrator preparation programs. Under the new vision, educators would have an opportunity to increase their assessment literacy while simultaneously taking back some ownership of assessment practice. Oregon needs to ensure that this vision includes both universal foundational training (e.g., in teacher and administrator preparation programs) and ongoing support of classroom assessment literacy for all decision makers and users of assessment information.

**Proposed misuse of annual test scores in educator evaluation.** Recently, federal and state policy makers have deemed it appropriate to factor growth in student achievement into the educator evaluation equation. Often, growth is naively defined by policy makers as year-to-year change in annual standardized test scores. This represents an indefensible use of these test results. The tests involved have not been validated for this purpose; that is, they have not been shown to be capable of detecting differences in the quality of instruction. The nature of the tests often keeps them from sampling individual teacher impact with sufficient precision. The tests cannot distinguish to whom the growth can be attributed as there are multiple educators (and other factors) who impact students in the subjects of reading and math. The year-long pre/posttest time span assures a confounding of instruction with factors that influence learning that are beyond educator control, thus rendering this basis for evaluation unfair. For all of these reasons, qualified psychometricians have almost universally rejected this source of evidence for the evaluation of individual teachers or school leaders.

There are better options for estimating student growth in this context that arise from classroom assessments. If teachers and principals develop and enhance their assessment literacy, they can generate dependable evidence of their impact on student learning in sharp detail. The quality of educator evaluation can be enhanced and, as a crucial side benefit, student learning can be measurably improved.

In summary, as we learn to use assessments more productively and expand our understanding to include a new vision of all assessment can be and do, these current realities will be replaced with learning that is driven by student need. Reactive assessment is insufficient and outdated. Oregon students and teachers need assessments that are proactive, inclusive, and empowering. *Assessment for learning* is practical and functional. It can become an embedded part of everyday learning for students, teachers, and parents, and when that happens, it will cease to feel like assessment. We do not need to do away with summative, standardized tests, which are currently the policy priority; but we do need to bring such testing into balance with formative and interim assessments that can drive student learning.

## Oregon Assessment: A New Vision of Excellence

Used appropriately, *assessment for student learning* has the potential to propel instruction forward productively by considering the learning needs of individual students and helping them know at any given time (not just annually) how far they have come along the path to success. With consistent and ongoing teacher support, *assessment for student learning* provides individualized support that allows learners to progress in a way and at a speed that suits their abilities and learning styles.

To understand this approach, we must appreciate that fact that assessment is a personal experience. It can enhance or detract from student learning and achievement. That's because assessment results affect how students see themselves. Those who fail repeatedly lose faith in themselves, and once they are convinced (largely by test scores) that success is beyond their reach, motivation declines. By contrast, consistently reaching for and attaining *achievable* goals (those "next steps" along the continuum) builds confidence and keeps students engaged in their own learning. Successful students not only gain faith in their own abilities, but gradually come to believe that they will continue to be successful in any or all future endeavors. They dare more, try more, persist more, and the results of that effort are not hard to infer.

Over the past half century, assessment has been seen primarily as a once-a-year, anxiety-driven, time-intensive, and high stakes accountability process. Schools are social institutions, so public accountability is important. But, particularly during the past two decades, Oregon and the nation have overemphasized statewide standardized assessment requirements to the systematic exclusion of assessment for learning. Policies have required ever more frequent testing and ever higher stakes—all under the assumption that this relentless focus on standardized testing will eventually improve schools. Yet, outcomes have largely remained unchanged. Standardized testing in and of itself has not been designed to inform instructional decisions that influence day-to-day learning. *Assessment for learning*, by contrast, is designed to influence precisely those kinds of decisions; such assessment has the potential to profoundly transform learning in Oregon classrooms.

## Guiding Principles

This new vision demands first, a universal commitment to the use of assessment to promote meaningful learning, and second, adherence to the following five guiding principles.

1. All assessments must arise from and serve a clear purpose.
2. They must be designed and developed to reflect developmentally and academically appropriate learning targets.
3. Each assessment must accurately reflect student learning.
4. Results must be effectively communicated to all intended users.
5. Our mission must be to use assessment in ways that encourage students to keep striving for learning success.

If these principles are not followed at all levels and by all users, Oregon students will

continue to struggle in meeting achievement standards due to the mis-measurement of their learning or the misuse of assessment results. These five guiding principles, however, can change Oregon's educational future.

Principle #1: All assessments must have a clear purpose.

Effective assessment begins with a clear sense of why we are assessing in the first place. Who will use the assessment results and what will that user accomplish? Without a clear sense of purpose, it is impossible to develop an assessment that will serve users in productive ways. Since assessment is the process of gathering evidence to inform instructional decisions, a good place to begin is by answering three critical questions:

- 1) What decision needs to be made?
- 2) Who is making the decision?
- 3) What information do they need?

The answers will vary profoundly depending on the context within which the questions are posed. In schools, instructional decisions are made at three levels:

- *Classroom assessments*: On an ongoing basis during instruction
- *Benchmark interim assessments*: Periodically throughout the school year
- *Summative assessments*: Yearly assessments that have mostly been standardized

At each of these three levels, some assessments support learning. They are known as *formative assessments*, and are built to identify specific learner needs during the learning process. Other times, assessments serve to verify what has been learned and are termed *summative assessments*. Summative assessments judge what skills or knowledge students have acquired over a specified period of time, typically for accountability purposes. They can also measure how the larger system is performing and may offer clues for needed improvement. Some summative assessments are external. Both formative and summative assessments are important, but they are different.

To understand the true meaning of a *balanced* system of assessment, it is helpful to examine the wide range of important questions teachers and administrators ask—questions they can only answer with assessment results from diverse sources. As the following table, *A Summary of Assessment Users*, clearly shows, the demands we place on assessment differ profoundly across contexts.



## A Summary of Assessment Users: Why different users require distinct assessments at varying times

Level of Assessment Use	Formative Applications of Assessment (to support learning) for Each User	Summative Applications of Assessment (to judge adequacy of learning) for Each User
<b>Using Classroom Assessment Results</b>	<p><b>Teachers:</b></p> <ul style="list-style-type: none"> <li>• Where are my students now in their learning?</li> <li>• What comes next for their learning and therefore my instruction?</li> </ul> <p><b>Students:</b></p> <ul style="list-style-type: none"> <li>• Am I progressing up the scaffolding?</li> <li>• What is my hope of continuing to grow in this subject?</li> <li>• Where am I now?</li> <li>• What comes next for me?</li> <li>• What specific help do I need?</li> </ul> <p><b>Parents:</b></p> <ul style="list-style-type: none"> <li>• Where and how can I help my child?</li> </ul>	<p><b>Teachers:</b></p> <ul style="list-style-type: none"> <li>• What standards have each student mastered?</li> <li>• What grade has each student earned on her or his report card?</li> </ul> <p><b>Students/Parents:</b></p> <ul style="list-style-type: none"> <li>• Am I/Is my child progressing in a satisfactory manner?</li> </ul> <p><b>Principals:</b></p> <ul style="list-style-type: none"> <li>• Is the teacher able to use assessments to provide evidence of student growth?</li> <li>• What support can I offer to this teacher?</li> <li>• Is there any change or support we need to implement on a school-wide basis?</li> </ul>
<b>Using Interim/Benchmark Assessment Results</b>	<p><b>Instructional Leaders and Educator Teams:</b></p> <ul style="list-style-type: none"> <li>• Which standards do our students tend to struggle in mastering?</li> <li>• Which students seem to be struggling right now?</li> <li>• Where can we improve instruction immediately to increase student success?</li> <li>• What can we learn from peers?</li> </ul>	<p><b>Instructional Leaders and Educator Teams:</b></p> <ul style="list-style-type: none"> <li>• Is this adopted instructional program delivering learning as promised? Should we continue, refine, or end it?</li> <li>• Do teachers need professional development to enhance their instructional knowledge?</li> <li>• Do we have the systems in place to support teachers and students to maximize learning?</li> </ul>
<b>Using Annual Results</b>	<p><b>Instructional Leaders and Educator Teams:</b></p> <ul style="list-style-type: none"> <li>• From year to year where do students show strengths and weaknesses?</li> <li>• What supports can be offered to change the year to year trend?</li> <li>• How can we support students vertically?</li> <li>• What can we learn from other schools and districts?</li> </ul>	<p><b>Instructional Leaders, Policy makers and the Community:</b></p> <ul style="list-style-type: none"> <li>• Are our students meeting standards?</li> <li>• Are there certain segments of our student population who need more support?</li> <li>• Is the curriculum and delivery model meeting the needs of the students?</li> <li>• Are there system improvement needs and efforts that will improve student learning outcomes?</li> </ul>

The future quality of education in Oregon schools relies on our ability to move from an assessment system overwhelmingly focused on summative testing and the gathering of annual data to one that relies on multiple forms of assessment and thereby serves the informational needs of *all* decision makers. We must set new priorities and allocate the resources needed to assure effective use of both formative and summative assessment at all three levels outlined in the chart above.

Principle #2: All assessments should reflect developmentally and academically appropriate learning targets.

The foundation of any assessment rests with the learning expectations or standards to be assessed. To ensure that Oregon's system of assessment is supportive of meaningful student learning, local expectations should be —

- Anchored to a broad range of standards addressing the skills needed to prepare students for pursuing a career and/or post-secondary education.
- Guided by a community vision of lifelong learning that promotes productive problem solving and encourages strong citizenship (See the State of Oregon's college, workplace and career readiness standards for one example).
- Reflective of the current best thinking in each field of study.
- Clearly and unambiguously stated using language that promotes universal understanding.
- Written in student- and family-friendly language that invites students and their families to be active participants in the assessment network.
- Organized to show educational progress within and across grade levels, ensuring that everyone involved can know what a student has mastered, what learning will be required next, and how best to facilitate those next steps.
- Thoroughly mastered by teachers, who will thus be better prepared to help their students meet these same expectations.

Only when these seven requirements are met will quality assessment and instruction be within reach in every classroom.

Principle #3: All assessment results must accurately reflect student learning.

All assessments (regardless of context) must meet accepted standards of quality so as to assure the dependability and usefulness of the results they yield. This means that each assessment must—

- Rely on an appropriate assessment method (e.g., multiple choice, short answer, essay, performance assessment) capable of measuring the learning target in question;
- Provide an appropriate sample of student performance: that is, enough evidence to allow a confident conclusion about the level of achievement attained;
- Rely on high-quality assessment items, exercises and tasks, and methods of scoring; and
- Minimize bias that can distort assessment results and provide misleading information about a student’s learning success.

The troubling reality in Oregon (and across the nation) is that these standards of quality may not currently be met across many levels of our school systems, thanks to over-reliance on high stakes standardized testing and a lack of assessment literacy among all users. A renewed emphasis on assessment for learning within the classroom brings with it new responsibility for teachers and other local educators, making the need for universal assessment literacy urgent. If the current gap in assessment literacy is not addressed, the new vision of excellence in assessment proposed here will be unattainable.

**Principle #4: All assessment results must be communicated effectively to intended users.**

We have established that the list of important users is long (e.g. students, teachers, parents, principals, and others), and that they need results from both formative and summative assessment at all levels (ongoing classroom, periodic benchmark, and annual). Because important decisions are made based on the results, those results must be delivered to users in an understandable format and timely manner. Strategies for accomplishing this vary, so the communicator must be prepared to select an option that best meets the needs of the intended user.

To help students close the gap between where they are now and where they need to be, feedback delivered from teachers on formative assessment results must—

- Focus on characteristics *of the work* rather than on attributes *of the student*.
- Describe the work in terms that show clearly how to do better next time.

- Be understood by the recipient.
- Be manageable in scope so that next steps do not feel overwhelming.
- Arrive when there is still time to adjust the work and learning, thereby improving performance.

Programs around the world that rely on the consistent application of these guidelines have reported impressive achievement gains (Hattie & Timperly, 2007). The same will be true in Oregon if all educators are given the professional development they need to deliver feedback that meets these criteria.

Effective communication about the sum of student learning must—

- Clearly state the learning requirements/standards being judged in terms understandable to everyone involved from the beginning of the learning.
- Rely on dependable evidence from quality assessments to reflect levels of student success.
- Compile and summarize evidence over time, using appropriate and transparent procedures.
- Clearly communicate what standards the student has mastered.

Professional development in assessment literacy would provide the opportunity for educators to learn about effective recordkeeping and communication processes in summative classroom assessment contexts.

## Student's Assessment Bill of Rights

### **A Students' Bill of Assessment Rights**

The rationale for reconsidering the student's place in the assessment process extends beyond the fact that their learning can benefit from their involvement. Ethical standards of fair and equal treatment of each and every student require adults to re-evaluate the student's place in the assessment process. Students can be seen as the holders of certain inalienable rights related to the collection and use of achievement information (Stiggins, 2014). Those rights are articulated below and they align with the five Guiding Principles spelled out above.

1. Students are entitled to know the purpose of each assessment in which they participate; that is, they have a right to know specifically how the results will be used.
2. Students are entitled to know and understand the learning target(s) to be reflected in the exercises and scoring methods that make up the assessment.
3. Students are entitled to understand the differences between good and poor performance on pending assessments and to learn to self-assess in terms of that performance continuum in tracking their progress toward mastery.
4. Students are entitled to dependable assessment of their learning using quality assessments.
5. Students are entitled to effective communication of their assessment results, whether to themselves, their families or others concerned with their academic success.

Principle #5: Users must always attend to the relationship between their assessment practices and student motivation.

Given society's demand for higher achievement for all students in all subjects, we must do everything in our power to keep students believing that success is within reach if they keep striving. We must prevent students from giving up—ever. We can accomplish this by making sure that throughout the time they are learning students always know and understand—

- What we want them to learn.
- Where they are now in relation to those expectations.
- What they need to do to close the gap between the two.

As students move through their various learning progressions, we must help them engage in self-assessment so they can monitor their growth and thus feel in control of their own learning. Specific classroom *assessment for learning* strategies have been formulated by Chappuis (2013) and woven into readily available professional development for teachers. Two decades of international research have revealed significant achievement gains for students when teachers consistently apply principles of assessment for student learning, with the largest gains demonstrated for students identified as low achievers (Black & William, 1998).

## Positive Impacts of the New Vision

When the *Guiding Principles* and the *Students' Assessment Bill of Rights* are followed consistently, all assessment users will understand their various roles in fostering maximum learning for all students. Following are brief descriptions of these various roles.

**Students.** Instruction will begin with the open sharing of student-friendly versions of the learning target(s) that are the focus of teaching and learning. Students will pursue those targets through ongoing learning progressions that are familiar to students, teachers, and parents. Quality formative assessment will ensure that at any given time, students know where they are headed, where they are now, and how to close the gap. As necessary, accommodations will be made to provide instructional support. Students

will understand their level of learning in relation to the progression of standards, have time to reflect on their progress, and set realistic goals. In this way, teachers will make sure each student feels in control of and responsible for his or her learning success. Confidence and optimism will dominate the classroom environment for both teachers and students. Students will be able to articulate their learning goal(s), the relevance of those goals to a broader educational outcome, and their proposed methods for demonstrating learning. Thanks to increased confidence and a sense of control, students will no longer fear failure; setbacks will be (and will seem to the student) minor, temporary, and reversible. Indeed, students will be inspired to take the kinds of risks required to advance learning, and will go further than many dreamed possible.

What is more, students will become part of the larger assessment network, actually *using assessment results* in their personal planning. They will feel confident that the information they receive from various assessments accurately reflects their learning, and that evidence collected over time reveals real growth. Their confidence will come from the quality of the assessments themselves as well as the manner in which their teacher communicates the results—in ways that support learning when *that* is the purpose, or as a summative evaluation of learning when *that* is the purpose.

**Teacher Practices.** Teachers will recognize how instructional decisions based on dependable assessment results promote both the success of their students and their own success as teachers. They will form effective partnerships with students to advance learning, confident that immediate feedback from dependable formative assessment will allow them to adjust instruction in useful, appropriate ways. They will feel supported in development of their own assessment literacy, and will experience growing confidence in their assessment and communication practices, whether formative or summative. Their day will be structured in such a way that allows for the five guiding principles above to become a reality; there will be significant time within a work day to plan and conduct assessment, to thoughtfully analyze and share assessment results, offer feedback to students, and differentiate instruction as indicated. Teachers will have the ability to generate dependable, credible evidence regarding the impact of their instruction on students' growth. Finally, they will be able to achieve the kind of success with students that renews their passion for education.

**Instructional Teams.** Teachers, principals, administrators and district leaders will have the assessment literacy needed to successfully design and implement truly balanced assessment systems—systems that meet the informational needs of all assessment users. They will be able to count on classroom, interim and annual assessments to be of

high quality, all producing dependable evidence of student learning for all instructional decision making purposes. Administrators will know how to communicate assessment results effectively in their leadership contexts and will see student performance heading in a steady upward direction.

**Parents, Families, Community Members, Local and State Policy Makers.** All parents, families, community stakeholders and policy makers will have confidence that their children, grandchildren, and students in general are learning and succeeding. They will understand when and how to offer quality instructional support when called upon to do so. Policy makers at all levels will have the opportunity to become more assessment literate, thereby increasing their capability to make the kinds of policy decisions that promote effective use of assessment as an integral part of learning.

## Proposed Action Plan: Transition to the New Vision

The proposed action plan that follows recognizes the values and beliefs articulated in the preceding section. It also addresses the challenges inherent in transitioning from an assessment system focusing almost exclusively on summative assessment to a more balanced system. The plan suggests actions that support the informational needs of students, teachers, principals, other instructional decision makers and policy makers, while offering a balance of assessment *for learning* to inform the learning process together with periodic assessments *of learning* to measure student success.

***Goal:*** *Increased focus on Assessment for Learning*

### OLD/CURRENT SYSTEM OF ASSESSMENT

Classroom & Formative	Interim	Annual Summative
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### NEW SYSTEM OF ASSESSMENT FOR STUDENT LEARNING

Classroom & Formative	Interim	Annual Summative
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(adopted from Leather, 2013, as cited in Darling-Hammond, Wilhoit, Pittenger, 2014)

## Recommendations

{Placeholder for Recommendations}



## Proposed Timeline to Attaining Balanced Systems of Assessment

Transitioning to a new kind of assessment system requires time; stakeholders must become engaged in collectively working toward this important goal. Most of the actions recommended above will require multiple years, with some actions being completed on an ongoing basis. The following timeline details proposed implementation plans:

{Placeholder for Timeline}

Note: The purpose of the following timeline is to identify potential steps that reflect the vision of the work group to transition to a new system of assessment that supports student learning. The work group looks forward to a broader discussion and suggestions for refinement.

{Placeholder for Timeline}

## *Planning for the Needs of Stakeholders*

Planning for, and implementing the transition into Oregon's new system of assessment requires long-term collaboration and partnership among education agencies, community based organizations and associations (e.g. COSA, ODE OEA, OEIB, OSBA, PTA, Chalkboard, Coalition of Communities of Color, Portland African American Leadership Forum, Latino Family Network, League of United Latin American Citizens, Confederated Tribes of Oregon, and other partners) to leverage and utilize resources that can make assessment for learning a reality. These organizations offer considerable expertise to help meet the needs of stakeholders during the transition. As these groups work together, certain needs must be met, and other stakeholders have needs as well. Following is a summary of those needs, by group.

### **Needs of Educators**

- Increased professional learning time for teachers and principals to collaboratively develop and enhance their assessment literacy
- Professional learning time to develop or adopt assessments for student learning that align with learning targets
- Development and sustainability of a statewide bank of high quality classroom and interim assessments
- Funds to support effective use of quality classroom and interim assessments
- Changes to schedules and the school year that would allow educators the time they need to use data in planning and to communicate assessment results to students, parents and other instructional partners

### **Needs of Parents**

- Opportunity to learn and enhance skills related to assessment literacy
- Opportunity to partner with educators to understand sound and unsound assessment practices
- Opportunity to be engaged and included in a manner that meets their cultural norms and allows for comfortable involvement in setting goals and determining next steps for their students' learning

### Needs of Community Members and Local School Boards

- Increased understanding of assessment results, including the trends of data at program, school and district levels
- Increased understanding of the vital and integral role assessment plays in learning, as well as differences between assessment *of learning* and assessment *for learning*

### Needs of Policy Makers and Legislators

- Increased understanding of assessment results, including the trends of data at program, school and district levels
- Increased understanding of what is required to ensure assessment literacy among educators, parents and community members
- Increased understanding of what is needed to transition from a system focused on standardized summative assessment to a system focused on assessment *for learning*

## Conclusion

As educators, we entered this profession with the desire to help all students learn, grow, and realize their full potential. As we highlight our foundational values and beliefs, we recognize the gap between a system of assessment *for learning* that can access every student's infinite potential and the system of assessment we presently have. It is time to build a bridge to our new vision. Let's leave the current system that relies too heavily on summative, standardized assessment as a basis for instructional decisions it was never designed to support, and build a new system in which assessment and learning work together for students' benefit, one in which all educators and stakeholders become assessment literate, and *every Oregon student* can reach his or her full potential. Let's join together to create this new system of assessment. In the words of Chappuis (2009),

*"Assessment for learning is a gift we give our students. It is a mirror we hold up to show them how far they have come. It is a promise that we will use assessment, not to punish or reward, but to guide them on their learning journey".*

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## Working Document

# Timeline

**Note:** The purpose of the following timeline is to identify potential steps that reflect the vision of the work group to transition to a new system of assessment that supports student learning. The work group looks forward to a broader discussion and suggestions for refinement.

	<b>Immediate January – August 2015</b>	<b>Next 12 months 2015-16</b>	<b>Next 12 months 2016-17</b>	<b>Next 12 months 2017-18</b>
<b>Policy Focus</b>	<ul style="list-style-type: none"> <li>● <b>Build Support:</b> Reach beyond the Work Group to teachers, instructional assistants, administrators, school boards, parents, communities of color, educator preparation programs, policy makers and others to refine and add other system concepts and build support.</li> <li>● <b>ESEA Reauthorization:</b> Create a process (e.g. coalition/work group of teachers, administrators, state education staff, parents) to identify critical elements for ESEA that allows Oregon to develop a system of assessment that supports student learning. Assessments would be valid, reliable and unbiased classroom and interim assessments and address the role of accountability in the system</li> </ul>	<ul style="list-style-type: none"> <li>● <b>Continue Support:</b> Support generally complete, Partners are engaged in the assessment shift, and discussions continue to create understanding for new system of assessment used to support student learning.</li> <li>● <b>System Refinement:</b> Continued refinement and begin implementation of the new system of assessment. Key focus areas include implementation details and funding needed to transition from existing approach to proposed system.</li> <li>● <b>Oregon ESEA Priorities:</b> Continue work with Oregon Congressional Delegation to advocate for Oregon’s priorities for ESEA reauthorization.</li> <li>● <b>National Collaboration:</b> Collaborate with national organizations (e.g. CCSSO, National Center for Innovation in Education) to leverage</li> </ul>	<ul style="list-style-type: none"> <li>● <b>Priority Focus:</b> Classroom and interim assessments (assessment for learning) emerge as the assessment priority across Oregon schools. Diminished use of standardized summative assessment to evaluate daily student learning</li> <li>● <b>System Refinement:</b> Continue refining methodology to reduce overall standardized summative assessments, but allows for disaggregation and identification of achievement gaps and identification of systems in need of support.</li> <li>● <b>Assessment Funds:</b> Additional funds are allocated to support the implementation of the new system of assessment.</li> </ul>	<ul style="list-style-type: none"> <li>● <b>New Methodology:</b> Continue implementation of new methodology and use summative assessments only as appropriate to provide information regarding student outcomes in larger systems – schools and districts – and allow for disaggregation and identification of achievement gaps and systems in need of support.</li> <li>● The vision of the system of assessment is evolving to include the following summary of components:               <ul style="list-style-type: none"> <li>○ Assessment literacy is prioritized and mastered by stakeholders.</li> <li>○ There will be a significant shift from annual standardized summative assessments to classroom and interim assessments for learning, including using some method of targeting of Smarter Balance Assessment and local school districts</li> </ul> </li> </ul>

	<b>Immediate January – August 2015</b>	<b>Next 12 months 2015-16</b>	<b>Next 12 months 2016-17</b>	<b>Next 12 months 2017-18</b>
	<ul style="list-style-type: none"> <li>● <b>Oregon ESEA Priorities:</b> Work with the Governor and Oregon Congressional delegation to advocate for Oregon’s priorities for ESEA reauthorization.</li> <li>● <b>Waiver:</b> Begin discussions with USED on a different approach to assessment. Advocate to continue the suspension of Smarter Balanced assessment results being tied to teacher evaluation while developing a more balanced system of assessment focused on student learning. Advocate for approval from USED not to use spring assessment results in rating schools or districts on the Oregon Report Card. The Smarter Balanced Assessment will be used as the summative assessment with USED and Oregon Legislature until such time as other assessments are developed as appropriate measures and with the understanding</li> </ul>	<p>support for Oregon’s proposed elements.</p> <ul style="list-style-type: none"> <li>● <b>Waiver:</b> Create coalition of partners to gain approval from US Dept. of Education to transition to a new system of assessment and maintain waiver while ESEA is being reauthorized. This includes using Smarter Balanced or other equal or better summative assessment but not using the summative assessment for educator evaluation.</li> <li>● <b>Audit of Assessments:</b> Use the audit to determine if the system is balanced and meets the needs of all students,</li> <li>● <b>Smarter Balanced Analysis:</b> Use the analysis of Smarter Balanced to determine if the assessment is accurately measuring the common core standards and the appropriate use of a standardized summative assessment.</li> <li>● <b>Target Smarter Balanced:</b> Research the feasibility of reducing the frequency of administering the annual state</li> </ul>		<p>choosing from a menu of high quality interim options for other grade levels. The methods provide for accurate disaggregated data of subgroups.</p> <ul style="list-style-type: none"> <li>○ Advocate for state and federal funds to develop or adopt and use high quality interim assessments, chosen by educators to meet the needs of their students from a menu of options vetted at the state and district level and that meet high standards of quality. These assessments will be vetted as valid, reliable, and unbiased.</li> <li>○ Students, in conjunction with educators and administrators, develop work samples to demonstrate their learning and progress toward academic goals.</li> <li>○ A statewide bank of high quality assessments at the interim and classroom levels for summative and formative use will be available for</li> </ul>

	<b>Immediate January – August 2015</b>	<b>Next 12 months 2015-16</b>	<b>Next 12 months 2016-17</b>	<b>Next 12 months 2017-18</b>
	<p>that the results of the standardized summative assessment will not be used to evaluate teachers or rate schools.</p> <ul style="list-style-type: none"> <li>● <b>Audit of Assessments:</b> Create a taskforce to conduct an audit of the type and number of assessments currently administered in Oregon schools. Include the amount of instructional hours being devoted to formative, interim, progress monitoring, and summative assessments.</li> <li>● <b>Analysis of Smarter Balanced (SB):</b> Complete a comprehensive analysis and report on the results of the 2015 Smarter Balanced assessments to determine the value in relation to student learning.</li> </ul>	<p>summative assessment while ensuring accurate yearly disaggregated data by subgroups. Research a valid and reliable growth measure methodology for the intervening years.</p> <ul style="list-style-type: none"> <li>● <b>Scale Back Smarter Balanced:</b> Research administering a scaled down version of Smarter Balanced.</li> </ul>		<p>educators.</p>



	<b>Immediate January – August 2015</b>	<b>Next 12 months 2015-16</b>	<b>Next 12 months 2016-17</b>	<b>Next 12 months 2017-18</b>
<b>Practice Focus</b>	<ul style="list-style-type: none"> <li>● <b>Assessment for Learning:</b> Advocate for a balanced system of assessment with the emphasis and action on classroom-based assessments for learning.</li> <li>● <b>Assessment Expenditures:</b> Provide appropriate expenditures for annual accountability testing with expenditures for quality and effective use of classroom and interim assessments. <ul style="list-style-type: none"> <li>● <b>Fund Assessment Literacy Professional Development:</b> Seek state funds to support multi-year professional development for educators on assessment literacy.</li> </ul> </li> <li>● <b>Assessment Literacy Opportunities:</b> Expand professional development focused on developing and enhancing assessment literacy of teachers and administrators through partner efforts and ODE professional learning team conferences.</li> </ul>	<ul style="list-style-type: none"> <li>● <b>Assessment Options:</b> Research other assessment options for generating system level evidence (e.g. portfolios, work samples, others)</li> <li>● <b>Assessment Literacy:</b> Use new funds to provide time for educators to engage in professional development opportunities that support the unique needs of teachers and administrators in large, medium and small districts.</li> <li>● <b>Classroom Assessments:</b> Identify and develop high quality local and classroom assessments for formative and summative use.</li> <li>● <b>Interim Assessments:</b> Evaluate existing high quality assessments for interim use and develop or adopt high quality interim assessments</li> <li>● <b>Preparation of Educators:</b> Work with Oregon higher education and pre-service programs for teacher and administrator preparation to strengthen assessment literacy into standards of preparation.</li> </ul>	<ul style="list-style-type: none"> <li>● <b>Assessment Literacy:</b> Seek funds to expand professional learning opportunities to parents and local school board members. Continue assessment literacy for educators as needed.</li> <li>● <b>Assessment Bank:</b> Initiate a bank of high quality assessments. Add high quality interim and classroom assessments to the statewide bank as appropriate for formative use. Build the bank over time.</li> </ul>	

	<b>Immediate January – August 2015</b>	<b>Next 12 months 2015-16</b>	<b>Next 12 months 2016-17</b>	<b>Next 12 months 2017-18</b>
	<ul style="list-style-type: none"> <li> <b>Fund Interim Assessments:</b> Advocate for state and federal funds to develop or adopt and use high quality interim assessments chosen by educators from a menu of options that meet standards of quality and vetted at the state and district level. </li> </ul>			

## DRAFT

# Recommendations for Creating a Highly Effective Assessment System

The following recommendations identify factors to consider in transitioning to a new system of assessment for student learning. These recommendations were developed by members from Oregon Education Association (OEA), Oregon Education Investment Board (OEIB), Oregon Department of Education (ODE) and school district advisors, who worked more than a year on researching, studying and developing a white paper titled, ***A New Path for Oregon: System of Assessment to Empower Meaningful Student Learning***. These recommendations will be vetted with a diverse group of stakeholders and will be revised based on their collective feedback.

### PAVING THE PATHWAY: POLICY FOUNDATIONS

**Recommendation #1:** Advocate and prepare for reauthorization of ESEA that allows states to develop a system of assessment that truly supports student learning through greater emphasis on valid, reliable and unbiased high quality classroom, interim assessments and addresses the role of accountability in the system.

**Recommendation #2:** Support the "*Student's Assessment Bill of Rights*" to ensure students know and understand the purpose of assessments, the learning targets that make up the assessment and how the results will be used; and also to ensure students understand the differences between good and poor performance on pending assessments and learn how to self-assess and track their progress.

### CREATING CONDITIONS FOR SYSTEM OF ASSESSMENT TRANSITION AND SUCCESS

**Recommendation #3:** Develop, fund, and implement extensive professional development, with a commitment to a multi-year program, to develop and enhance assessment literacy of educators. The effort should focus on high quality classroom, interim, and annual assessments, both formative and summative uses that have a clear purpose and support state standards and well defined learning targets. Utilize federal funding as a result of Representative Bonamici's recent bill that would advance funds to states around assessment practices.

<http://www.gpo.gov/fdsys/pkg/BILLS-113hr5807ih/html/BILLS-113hr5807ih.htm>

**Recommendation #4:** Create a taskforce to conduct an audit of the type and number of assessments currently administered in Oregon schools. Include the amount of instructional hours being devoted to formative, interim, progress monitoring and summative assessments to determine the impact on teaching and learning time.

**Recommendation #5:** Advocate for state and federal funds to initiate and maintain statewide classroom and interim assessment banks for formative and summative use. These assessments will also be vetted as valid, reliable, and equitable, and made available for districts and individual educators to use.

**Recommendation #6:** Invest in the technology necessary to administer high quality formative, interim and summative assessments focused on learning not just for administering standardized tests, and to ensure students have access to technology for college and career readiness.

**Recommendation #7:** Examine the current state of accommodations for special education students, English language learners, and other populations of diverse students to determine the impact of the additional testing and determine an appropriate level of assessment for every subgroup of students.

**CONSTRUCTING A NEW SYSTEM OF ASSESSMENT**

**Recommendation #8:** Research the feasibility of reducing the frequency of administering the annual statewide standardized summative assessment while ensuring accurate yearly disaggregated data by subgroups through enhancing the use of valid and reliable formative and interim assessments.

**Recommendation #9:** Advocate for state and federal funds to develop and use high quality formative and interim assessments chosen by educators from a menu of options vetted at the state and district level that meet the needs of their students and high standards of quality. These assessments will be standards-based, vetted as valid, reliable, and unbiased. Students may also develop, in conjunction with educators and administrators, work samples to demonstrate their learning and progress toward common core and other academic standards.

**Recommendation #10:** Allow high school students to opt-in to the Math or ELA section(s) of the Smarter Balanced Assessment earlier than 11th grade so that they take the assessment as it coincides with their actual academic course load rather than the current system which may have students taking a test on content they haven't studied for two or more years. In essence, allow students to "bank" portions of the test.

**Recommendation #11:** Enhance and expand options to demonstrate essential skills. Determine if other measures of essential skills exist and promote them as options for students.

**CREATING TIME TO IMPLEMENT RECOMMENDATIONS**

**Recommendation #12:** Suspend the use of Smarter Balance Assessment results during 2015 for school ratings on report cards, but allow students to use their 2015 Smarter Balance Assessment results to demonstrate Essential Skills for high school graduation and allow for comprehensive analysis of Smarter Balance to determine the value in relation to student learning. Continue to suspend the use of Smarter Balance Assessment results for educator evaluation during 2015-16 while developing a more balanced system of assessment.



# Board of Education Informational Report

## MEMORANDUM

**Date:** February 12, 2015

**To:** Members of the Board of Education

**From:** Antonio Lopez, Assistant Superintendent, Office of School Performance

**Subject:** School Staffing Priorities

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At the District's Board of Education Meeting on February 17, 2015 the members of the board will have a work session on school staffing priorities for the coming year. Superintendent Smith is scheduled to present the school staffing plan and framework for her budget proposal to the board in the week of March 9, 2015 and to formally propose the budget for 2015-16 on March 31, 2015.

The purpose of the discussion on February 17 is to provide board members the opportunity to provide guidance to staff as to school staffing priorities for the budget for the coming year, to identify areas that board members wish to see addressed, and to provide overall direction for budget development.

As we have discussed several times recently, there are several variables that affect the budget for next fiscal year. Those variables include student enrollment, local levies, and the most critical one is the state appropriation for K-12 education. Because next year is the first year of the biennium and we do not know the legislative appropriation for K-12 education yet, there is some uncertainty regarding revenue projections for FY2015-16.

Our first priority is to maintain the current service level and sustain existing programs and services. However, we are hoping to be able to build upon this current service level, especially in school staffing, because of the renewal of the local option levy. The budget exercise on February 17 is designed to get the board's input and direction to prioritize any investments the district is able to make if funding allows.

The three strategic priorities for PPS are:

- Ensuring that all students are reading at benchmark by the end of third grade.
- Improving high school graduation and completion rates.
- Eliminating disproportionality in out of school discipline between white students and students of color and reducing out-of-school discipline for all students by 50 percent.

Budget development for 2015-16 will be designed to support these three priorities and will be undertaken in alignment with the PPS Racial Educational Equity Policy, which explicitly calls for the differentiation of resources in order to accomplish the goals of "raising the achievement of all students while (1) narrowing the gaps between the lowest and highest performing students and (2) eliminating the racial predictability and disproportionality of which student groups occupy the highest and lowest achievement categories" ..... "even when this means differentiating resources to accomplish this goal."

Staff will use the priorities established by the board through this exercise to inform and guide the work of developing the superintendent's proposed budget.

Disclaimer: This is an exercise. The opportunities described are not formal budget proposals and this is not an exhaustive list of ideas under consideration. A number of these topics are still the subject of continuing work. The options are to be representative of program focus not specific activity. The values are artificial and are likely to be different in any final proposals presented during the budget development process.

### **Directions**

For the purposes of this exercise, staff has identified a number of potential investment opportunities, most of which have been given a points value representing three prioritization levels. We are asking Board members to review the summary descriptions of the various opportunities and select options that add up to 60 points, or as close as you can get!

The details for the exercise are set out in the Excel spreadsheet [sent with this note].

The first tab "Priority Summary Sheet" lists the various programs and priority options, and includes the total points available (60) and the balance remaining. Once you make a choice, that amount will change.

For each program and priority option there is a tab with a brief summary and a description of the options. Please make your choices on the tabs and not on the summary page. Enter the value of the option you choose, not the number of the option (For example, if option 1 costs 15 points enter "15" not "1"). For your convenience the balance remaining is also shown on each tab.

This information will also be sent to you via email so that you have the spreadsheet available electronically to work on prior to the meeting. There will be a brief review of the exercise at the start of the work session and then we will move straight into board discussion. We would ask that board members review the material and make their preliminary choices before the board meeting. We will have the spreadsheet loaded on a computer at the work session to assist in facilitating the discussion.

### **Questions for the board**

1. How would you allocate 60 points among these options?
2. What are the underlying values or interests that informed your choices and priorities among all these opportunities?
3. Are there other general concepts missing from this list that you want to ensure are reviewed in the budget development process?
4. Are there any things that are currently being funded (not on this list) that you would cut or reduce funding for, in order to increase investment in programs to improve outcomes for our students?

### **Attachments:**

Budget Prioritization Exercise – copy of Excel worksheet

Note: This material has also been sent to you via email so that you can have the Excel file to work with electronically.

**Staffing Prioritization Exercise: February 17, 2015**

Program Option (see tab for details)		Total Available:			60
		Option 1	Option 2	Option 3	Choice
<b>Third Grade Reading Priority:</b>					
A	Educational Assistant Support for Kindergarten	15	25	45	0
B	Kindergarten Attendance Support	5	6	12	0
C	Targeted Support at Focus/Priority Schools	8	14	20	0
D	Improve Staffing allocation for grades 1-2	24	40	58	0
E	Librarians/Media Specialists	16	29	45	0
<b>High School Graduation/Completion Priority:</b>					
E	College & Career Readiness @ High School	5	10	15	0
F	Improve HS Staffing Ratio	10	20	30	0
G	Consistent Middle Level Programs at K-8s	10	15	20	0
<b>Disproportionate Discipline Priority:</b>					
H	Counselors in K-5	5	10	15	0
I	School Leadership	10	20	30	0
J	Counselors in K-8/Middle School (also supports college and career readiness)	8	12	23	0
<b>Stronger School Capacity to Address all Priorities</b>					
K	Arts - Expansion in K-5/K-8	9	24	50	0
L	School Secretaries - K-8	6	17	18	0
M	Increase Substitutes	5	10	15	0
N	PE Teachers	28	34	56	0
		164	286	452	0
<b>Balance Remaining:</b>					<b>60</b>

A. Educational Assistant Support for Kindergarten

	Option 1	Option 2	Option 3	Choice
Cost:	15	25	45	

Balance Remaining 60

PPS has a commitment to ensuring that students get a strong start to their school experience and a successful kindergarten year is a vital element of that strategy. Adding a half-time educational assistant to kindergarten classes will provide support for early literacy programs, increase the number of students on-track to learn to read in first grade, as well as provide additional support for appropriate social-emotional development.

The following investment options use an equity lens to prioritize the allocation of educational assistants based upon the % of historically underserved students in the school.

Option 1 adds a half-time EA in all kindergarten classes in all schools where 80% or more of the students are historically underserved.

Option 2 adds a half-time EA in all kindergarten classes in all schools where more than 50% of the students are historically underserved.

Option 3 adds a half-time EA in all kindergarten classes in all schools.



## B. Kindergarten Attendance Support

	Option 1	Option 2	Option 3	Choice
Cost:	5	6	12	

Balance Remaining 60

PPS has a commitment to ensuring that students get a strong start to their school experience and a successful kindergarten year is a vital element of that strategy. Attendance is an issue for some kindergarten students. Improving attendance and building strong family connections. Improving attendance and building strong family connections can be expected to improve student outcomes and launch students and families on a successful school experience.

The following investment options use an equity lens to prioritize the allocation of attendance coordinators/community agents based upon the % of historically underserved students in the school.

Option 1 adds a half-time position in schools with kindergarten where 80% or more of the students are historically underserved.

Option 2 adds a half-time position in schools with kindergarten where 70% or more of the students are historically underserved.

Option 3 adds a full-time position in schools with kindergarten where 70% or more of the students are historically underserved.

### C. Targeted Support at Focus/Priority Schools

	Option 1	Option 2	Option 3	Choice
Cost:	8	14	20	

Balance Remaining 60

Some focus and priority schools are in need of additional support to ensure improved outcomes for students. This support would be focused on early grades literacy and ensuring effective implementation of RTI supports.

Option 1 adds a full-time teacher and a half-time educational assistant at each of **four** schools, and two full-time positions to support and coordinate this work.

Option 2 adds a full-time teacher and a half-time educational assistant at each of **eight** schools, and two full-time positions to support and coordinate this work.

Option 3 adds a full-time teacher and a half-time educational assistant at each of **twelve** schools, and two full-time positions to support and coordinate this work.

D. Improve Staffing Allocation for Grades 1 & 2

	Option 1	Option 2	Option 3	Choice
Cost:	24	40	58	

Balance Remaining 60

Reducing class size in grades 1/2 by increasing the staffing allocation to schools would support the third grade reading priority to support literacy in RTI model.

Option 1 adds a full-time teacher for grades 1-2 in all schools where 70% or more of the students are historically underserved.

Option 2 adds a full-time teacher in all schools for grades 1-2 where more than 40% of the students are historically underserved.

Option 3 adds a full-time teacher in all schools serving students in grades 1-2.

## E. Librarians

	Option 1	Option 2	Option 3	Choice
Cost:	16	29	45	

Balance Remaining

20

Improving student literacy as indicated by the number of students who are "reading to learn" as measured by number of students meeting or exceeding third grade reading benchmark, is a top priority for PPS and one of the milestones by which we measure our progress. One of the investments that can support this priority is culturally responsive library/media specialists.

The following investment options use an equity lens to prioritize the addition of funding for an assistant principal based upon the % of historically underserved students in the school.

Option 1 provides funding for a half-time librarian/media specialist in all K-5/K-8 schools where 50% or more of the students are historically underserved.

Option 2 provides funding for a half-time librarian/media specialist in all K-5/K-8 schools.

Option 3 provides funding for a half-time librarian/media specialist in all K-5/K-8 schools, and for a full-time position in all K-5/K-8 schools where 50% or more of the students are historically underserved.

## F. College & Career Readiness @ High School

	Option 1	Option 2	Option 3	Choice
Cost:	5	10	15	

Balance Remaining 60

PPS has begun to develop and invest in a variety of targeted strategies to support career-related learning and to engage all students in active preparation for college and career in their post-secondary experience. These include recent investments to provide equipment and materials for expanded CTE classes, funding to support additional dual credit classes, expansion of AVID to three high schools and a larger number of middle and K-8 schools, and the pilot of a specific college & career readiness classes for ninth grade students.

Option 1 funds a full-time program coordinator for AVID or other college & career related programs in each high school.

Option 2 funds the coordinators and a **half-time** teacher in each high school.

Option 3 funds the coordinators and a **full-time** teacher in each high school.

## G. Improve HS Staffing Ratio

	Option 1	Option 2	Option 3	Choice
Cost:	10	20	30	

Balance Remaining 60

This is a simple add of staffing to high schools.

Option 1 funds an additional teacher at each high school and one more teacher at alternative programs.

Option 2 funds an additional two teachers at each high school and two more teachers at alternative programs.

Option 3 funds an additional three teachers at each high school and three more teachers at alternative programs.

## H: Middle Level Support at K-8s

	Option 1	Option 2	Option 3	Choice
Cost:	10	15	20	

Balance Remaining 60

The size of many 6-8 programs within our K-8's limits the number of differentiated supports we are able to provide outside of the core program. This resource would support more robust programming at the 6-8 level in K-8's, more commensurate with that offered at our larger middle schools. Programming may include expanded arts, world language, and/or differentiated reading and math instruction.

The following investment options use an equity lens to prioritize the increase in that allocation to a full-time position for schools based upon the % of historically underserved students in the school.

Option 1 would provide an additional half-time teacher at each K-8 school where more than 50% of the students are historically underserved, which could be used to support more robust implementation of the core program, for example in areas of world language and mathematics.

Option 2 would fund an additional half-time position at each K-8 school.

Option 3 would fund an additional half-time position at each K-8 school, and would make that a full-time addition at each K-8 school where more than 70% of the students are historically underserved.

**I. Counselors in PK-5**

	Option 1	Option 2	Option 3	Choice
Cost:	5	10	15	

Balance Remaining 60

Students in PPS schools face a number of challenges in their overall life circumstances that can be mitigated with the support of a counselor. Staffing ratios for counselors in elementary schools are lower than in high schools. 20 of our K-5 schools are only allocated a 0.5 FTE for counselor.

Some of these schools may have a full-time counselor but only by using other staffing allocation to make the position full-time.

The following investment options use an equity lens to prioritize the increase in that allocation to a full-time position for schools based upon the % of historically underserved students in the school.

Option 1 increases funding to a full-time position for all K-5 schools where more than 50% of the students are historically underserved.

Option 2 increases funding to a full-time position in all K-5 schools.

Option 3 introduces a 400:1 student:counselor staffing ratio.

This increased staffing would be reflected in the school wide support table for these schools.



## J. School Leadership - Single Administrators

	Option 1	Option 2	Option 3	Choice
Cost:	10	20	30	

Balance Remaining 60

In 28 of our smaller elementary schools (both K-5 and K-8) the school support funding allocation only provides for a single school administrator (i.e. a principal). These schools do not receive funding for an assistant principal. Many of these schools also (because of small size) only get funding for a half-time counselor.

Having a second administrator in a school allows for more support for teachers including effective support for improvements in early literacy instruction, more equitable discipline practice and improved grade level achievement ultimately leading to better graduation rates.

The following investment options use an equity lens to prioritize the addition of funding for an assistant principal based upon the % of historically underserved students in the school.

Option 1 provides funding for an AP in all schools where 70% or more of the students are historically underserved.

Option 2 provides funding for an AP in all schools where more than 40% of the students are historically underserved.

Option 3 provides funding for an AP in all schools.

This increased staffing would be reflected in the school wide support table for these schools.

## K. Counselors in Middle Grades

	Option 1	Option 2	Option 3	Choice
Cost:	8	12	23	

Balance Remaining 60

Students in PPS schools face a number of challenges in their overall life circumstances that can be mitigated with the support of a counselor. Staffing ratios for counselors in elementary schools are lower than in high schools. 24 of our K-8 and middle schools are only allocated a 0.5 FTE for counselor. Increasing staffing in these positions will also support college & career plans for middle grades students.

Some of these schools may have a full-time counselor but only by using other staffing allocation to make the position full-time.

The following investment options use an equity lens to prioritize the increase in that allocation to a full-time position for schools based upon the % of historically underserved students in the school.

Option 1 increases funding to a full-time position for all K-8 and middle schools where more than 50% of the students are historically underserved.

Option 2 increases funding to a full-time position in all K-8 and middle schools.

Option 3 introduces a 400:1 student:counselor staffing ratio.

This increased staffing would be reflected in the school wide support table for these schools.

## L. Arts - Expansion in K-5/K-8

	Option 1	Option 2	Option 3	Choice
Cost:	9	24	50	

Balance Remaining 60

PPS receives funding from the City of Portland to pay for arts teachers (art, music, dance, drama) in schools serving students in grades K-5. After two decades of budget cuts arts education in these schools was almost non-existent. This City funding has allowed PPS to significantly increase arts education in these schools.

While this is a dramatic improvement 19 schools only receive funding for a half-time position, and the funds cannot be used to provide teachers for students in grades 6-8 in K-8 schools.

Option 1 increases the funding to ensure that every school has at least one full-time arts position.

Option 2 would increase the funding to ensure that every school has at least one full-time arts position, and also fund an additional half-time position in all of the K-8 schools to be used for students in 6-8.

Option 3 would match the City arts income tax funding allocation to all schools serving schools in grades K-5, and would allow for use of these PPS funds for students in 6-8 at K-8 schools.

## M. School Secretaries

	Option 1	Option 2	Option 3	Choice
Cost:	6	17	18	

Balance Remaining 60

Staff in elementary school offices undertake a myriad of duties to support the operation of the school. Many times the school office is the first place that a visitor sees the school and the ability of office staff to be helpful and responsive is a key component of the school culture and school-family partnership components of the successful schools framework.

Despite recent increases in classified staffing in schools many schools have less than two full-time school secretaries funded in the school support allocation.

Option 1 increases the allocation to ensure that all schools serving students in grades K-8 have a minimum of two full-time secretaries.

Option 2 adds an additional half-time secretary to all schools serving students in grades K-8.

Option 3 increases the allocation to ensure that all schools serving students in grades K-8 have a minimum of two and one-half full-time secretaries.

This increased staffing would be reflected in the school wide support table for these schools.

## N. Increase Substitutes

	Option 1	Option 2	Option 3	Choice
Cost:	5	10	15	

Balance Remaining

60

PPS funds a pool of substitute staff for many of the employee groups in our schools.

In some cases it has proven difficult to recruit sufficient staff for these substitute pools.

In the case of educational assistants and paraeducators this situation could be improved by hiring a number of staff as permanent full-time employees, with their substitute assignment to be determined on an as needed basis.

We believe there is sufficient need for subs that these staff would be used at all time during the school year.

Option 1 funds five permanent substitutes for EAs and five for paraeducators

Option 2 funds ten permanent substitutes for EAs and ten for paraeducators

Option 3 15 permanent substitutes for EAs and 15 for paraeducators

## O. PE Teachers

	Option 1	Option 2	Option 3	Choice
Cost:	28	34	56	

Balance Remaining 60

Beginning in 2017-18 all schools across Oregon will have to provide students in kindergarten through grade 5 with at least 150 minutes of physical education during each school week and to provide students in grades 6 through 8 with at least 225 minutes of physical education during each school week.

Three investment options are presented for consideration:

Option 1 funds a half-time PE teacher in all schools serving students in grades K-5 , i.e. including K-8 schools

Option 2 funds a half-time PE teacher in all schools serving students in grades K-8 , i.e. including middle schools

Option 3 funds a full-time PE teacher in all schools serving students in grades K-5 , i.e. including K-8 schools



# Board of Education Informational Report

## MEMORANDUM

**Date:** February 17, 2015  
**To:** Members of the Board of Education  
**From:** Joe LaFontaine  
**Subject:** 2015-16 Funded Programs Budget Proposals

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### **Background:**

- These federal dollars are to supplement the needs of underserved populations. Funded Programs works collaboratively with internal departments and external community members to build greater supports.
- This budget was constructed after several interdepartmental discussions about how best to utilize these funds to support the three district initiatives. Specific examples for each initiative will be covered in the February 17 presentation.
- Funded Programs has been seeing a steady decline in our allocation for the past six years. We anticipate approximately another 5% decrease for 2015-16.
- This projection is largely due to a reduction in the number of qualified students who reside inside our district. As they move out, the federal funds move with them.
- Funded Programs underwent redesign last spring to promote greater support for struggling schools.
- Thirty-one schools currently receive school-wide support. (The list is included in the packet.)
- Funded Program has shared the expense of Title I kindergarten, but cannot allocate funds for kindergarten in 2015-16.

### **Evaluation of Existing Program:**

The Funded Programs Department was redesigned in the spring of 2014 to create greater capacity to support school improvement. This realignment of resources has resulted in a greater ability to provide services to families and schools through direct oversight, rather than through policy and systems. Our outreach has resulted in growing identification in our homeless and migrant populations. The work impacts all three of our district initiatives of **reading by the end of third grade, reducing disproportionate discipline** and **increasing high school graduation rates**.

To the point of redesign, Funded Programs has been staffed with two experienced turnaround administrators to guide school improvement processes. Portland Public Schools started the 2014-15 school year with fourteen schools formally designated for school improvement. (See the attached list of Title I Schools.) Another seven Title I schools have report card scores low enough to designate them, if designation occurred annually. Funded Programs collaborates very closely with the Office of School Performance to support the needs of these schools.

The 2014-15 budget invested approximately 44% of the departmental budget to our kindergartens and pre-k programs. The research (Goldring and Presbrey) *shows “preschool intervention programs do have positive effects regardless of diversities in sites, length of intervention and curriculum models. Children who took part in preschool intervention programs were still showing, in elementary school, a gain of about half a standard deviation more than counterparts who had not taken part in such programs.”*

This early intervention model will provide our early learners with a jump start on their **third grade reading** ability.

### **Next Steps for Investment:**

Portland Public Schools are at a crossroads with our progress in Title I schools. We have a disproportionate rate of schools that have been identified as needing improvement and we are quickly constructing support systems to support them. This should be our top priority, so we avoid any more schools falling into improvement designation.

The 2015-16 budget proposal offers a very similar rate in funding for all the Title I schools, even with our transition to the Community Eligibility Provision funding model. Additionally, funds have been set aside to address support for schools that are struggling to sustain student achievement. Seven schools have been targeted for specific supports to prevent their formal designation by the state. By providing support to these elementary, middle and high schools, these additional funds will be directly supporting all three of our district initiatives.

Our second priority would be to support district early learning initiatives through one of three models:

1. Pre-kindergarten classrooms.
2. Provide a ½ EA for each Title I elementary kindergarten classroom.
3. A combination of both.

The model selected will be based on how best to support the district programs for our early learners. Our aim is to support those programs and enrich their quality in our underrepresented communities. The opportunities we can offer our pre-k students will certainly impact our **3<sup>rd</sup> Grade reading milestone**,

We will work with the Office of Teaching and Learning to organize the pre-k curriculum and assessment to measure the success of our programs. Additional program supports will come in the form of;

- a PLC for our growing community of pre-k instructors,
- pre-k transition coordinators who work with families to connect them to their neighborhood schools,
- two more (Conectar, Instruir y Aprender) in-home native language parent-as-teacher programs, and
- a pre-k behavioral support person to provide classroom behavioral support.



Our third priority was to create connections to specific community partnerships that impact our families and supplement that work. Building on the work of the Equity Department we are going to help construct deeper channels of support with existing partners who are already working to mentor our black youth.

Beyond the \$120,000 mandatory set aside our Funded Programs has for family engagement, additional funds have been allocated to work with the Office of School and Family Partnerships. In conjunction with that department and a variety of community stakeholder groups, we want to extend funds to create parent education classes designed to meet the needs of our families in their native language.

This work will promote progress on all three of our district initiatives.

Additionally, we have set aside funds to support summer school for variety of target populations.

We feel these designs support the district initiatives as well as the plans made by our colleagues and predecessors.

Attachments (3):

1. Title I Schools List 2014-16
2. 2015-16 Funded Programs Budget
3. Power Point Notes

## 2014-15 Title I Schools

School	Type	2014-15 status	2015-16 Status
Arleta	(K – 8)		
Astor	(K – 8)	Bridge Year	No Longer Title I
Boise-Eliot	(Pre-K – 8)		
Bridger	(K – 8)		
Cesar Chavez	(K – 8)	Focus	Focus
CJ/OG	(K – 8)	Priority – Bridge Year	Priority – No Longer Title I
Creston	(K – 8)		
Faubion	(Pre-K – 8)		
George	(MS)		
Grout	(K – 5)		
Harrison Park	(K – 8)		
James John	(K – 5)		
Jefferson	(HS)	Focus	Focus
Kelly	(K – 5)		
King	(Pre-K – 8)	SIG Year 4	Priority
Lane	(MS)	Focus	Focus
Lee	(K – 8)		
Lent	(K – 8)		
Marysville	(K – 8)		
Peninsula	(K – 8)		
Rigler	(K – 5)	Focus	Focus
Rosa Parks	(K – 5)	Priority	Priority
Roosevelt	(HS)		
Scott	(K – 8)	Focus	Focus
SEI	(MS)		
Sitton	(K – 5)	Focus	Focus
Vernon	(Pre-K – 8)	Focus – Bridge Year	Focus – No Longer Title I
Vestal	(K – 8)		
Whitman	(K – 5)	Focus	Focus
Woodlawn	(Pre-K – 8)	SIG Year 1	SIG Year 2
Woodmere	(K – 5)	Focus	Focus

Note: **Madison High School** is not a Title I school but it is a SIG school. That grant expires in 2014-15 and it will not be formally designated, since it is not a Title I school.

**Markham** and **Alliance** will become Title I school wide programs beginning in the 2015-16 school year.

# FUNDED PROGRAMS 2015-16 BUDGET RECOMMENDATIONS

## Projected Budget

2014-15 Allocation:	\$12,518,000
2015-16 Projection Allocation: (5% Less)	\$11,892,000
Projected carry-over	\$95,000

## Fiscal Centers

1. Funded Programs Department
2. Focus/Priority School Support
3. Student/School Based Support
4. District Programing

## FUNDED PROGRAMS

Department Staff (7.5 FTE)

Mandatory Fiscal Set Asides

Family Engagement

Neglected and Delinquent Students

Homeless

Indirect Support to PPS

## Focus / Priority School Support

Director of School Improvement

Focus/Priority Set Aside

Successful School Support

Additional State Coaching

## STUDENT & SCHOOL BASED ALLOCATIONS

Comparable School Based Allocations

Expanded Pre-Kindergarten Instruction and support

- Additional Pre-K Classrooms

- Two more CIA locations

- Pre-K classroom behavioral support

- Pre-K parent transition support

Continued Support of Head Start Programming

Students Supports

- Eighth Grade transition coordinator

- Parent Education

- Underrepresented Male Mentoring

## DISTRICT PROGRAMMING

Summer School Programs

Office of Partnerships Support for SEI

## QUESTIONS?

<b>2015-16 TITLE IA BUDGET - PROJECTED</b>			
FY15/FY16 Comparison			
updated: 2/11/15			
<b>I. FUNDED PROGRAMS</b>	<b>FY15</b>	<b>FY16</b>	<b>Change</b>
<b>FUNDED PROGRAMS STAFFING</b>			
Senior Director	\$ 159,200	\$ 163,500	\$ 4,300
Director of Homeless and Migrant	\$ 148,500	\$ 152,500	\$ 4,000
Director of Private Schools and Early Learning	\$ 147,700	\$ 129,800	\$ (17,900)
Support Staff (3.5 FTE)	\$ 274,500	\$ 282,700	\$ 8,200
Migrant Education Assurance (1.0 FTE)	\$ 52,500	\$ 53,100	\$ 600
Supplies & Tech Support	\$ 32,000	\$ 32,000	\$ -
Private School Corp Admin Fees	\$ 40,000	\$ 40,000	\$ -
subtotal	\$ 854,400	\$ 853,600	\$ (800)
<b>FAMILY ENGAGEMENT SET ASIDE (1% OF TOTAL ALLOCATION)</b>	\$ 125,200	\$ 119,867	\$ (5,333)
<b>TITLE ID - NEG &amp; DEL (92 students @ \$625/student)</b>	\$ 43,200	\$ 57,500	\$ 14,300
<b>TITLE X HOMELESS PROGRAM (3.25 FTE + SUPPLIES &amp; MATERIALS)</b>	\$ 185,000	\$ 185,000	\$ -
<b>INDIRECT SUPPORT TO PPS (6.45%)</b>	\$ 873,600	\$ 726,300	\$ (147,300)
<b>TOTAL</b>	<b>\$ 2,081,400</b>	<b>\$ 1,942,267</b>	<b>\$ (139,133)</b>
<b>II. FOCUS/PRIORITY SCHOOL IMPROVEMENT</b>	<b>FY15</b>	<b>FY16</b>	<b>Change</b>
<b>FOCUS/PRIORITY SCHOOL SET ASIDE - Increase from 11 to 16 Schools</b>			
Director of School Improvement	\$153,600	\$157,800	\$4,200
<b>SCHOOL SUPPORTS</b>			
Successful Schools Support	\$ 150,000	\$ 150,000	\$ -
Title I School Coaches (Education NW Contract)	\$ 265,700	\$ 265,700	\$ -
<b>TOTAL</b>	<b>\$ 789,300</b>	<b>\$ 893,500</b>	<b>\$ 104,200</b>
<b>III. STUDENT &amp; SCHOOL-BASED SUPPORTS</b>	<b>FY15</b>	<b>FY16</b>	<b>Change</b>
<b>SCHOOL ALLOCATIONS</b>			
PPS (7,237 students) - \$658/student	\$ 4,761,904	\$ 4,761,946	\$ 42
Private Schools (734 students) - \$658/student	\$ 385,154	\$ 482,972	\$ 97,818
subtotal	\$ 5,147,058	\$ 5,244,918	\$ 97,860
<b>KINDERGARTEN</b>			
PPS	\$ 3,954,300	\$ -	\$ (3,954,300)
Private Schools	\$ 319,695	\$ -	\$ (319,695)
subtotal	\$ 4,273,995	\$ -	\$ (4,273,995)
<b>PRE KINDERGARTEN</b>			
PK Classrooms Expansion/Kindergarten EA's	\$ 783,000	\$ 2,430,040	\$ 1,647,040
Clarendon ECC Family Service Agent (.50 FTE)	\$ 22,000	\$ 22,000	\$ -
PK Classroom Behavioral Support EA (1.0 FTE)	\$ -	\$ 43,000	\$ 43,000
CIA - Expand from 1 to 3 Sites	\$ 125,000	\$ 375,000	\$ 250,000
subtotal	\$ 930,000	\$ 2,870,040	\$ 1,940,040
<b>STUDENT SUPPORTS</b>			
PK and HS Transition Coordinator (2.0 Non Rep FTE, 260 days)	\$ -	\$ 171,000	\$ 171,000
Parent Education	\$ -	\$ 25,000	\$ 25,000
Mentoring Program Support	\$ -	\$ 20,000	\$ 20,000
subtotal	\$ -	\$ 216,000	\$ 216,000
<b>EARLY LEARNING/PRE-KINDERGARTEN</b>			
Headstart (3.0 FTE)	\$ 315,000	\$ 315,000	\$ -
<b>TOTAL</b>	<b>\$ 10,666,053</b>	<b>\$ 8,645,958</b>	<b>\$ (2,020,095)</b>
<b>IV. DISTRICT PROGRAMMING</b>	<b>FY15</b>	<b>FY16</b>	<b>Change</b>
<b>AVID</b>			
Staff Development	\$ 108,100	\$ -	\$ (108,100)
1.0 Program Administrator	\$ 145,000	\$ -	\$ (145,000)
subtotal	\$ 253,100	\$ -	\$ (253,100)
<b>SUMMER PROGRAMMING</b>			
8th Grade Transition	\$ 50,000	\$ 50,000	\$ -
ESL Summer Academy	\$ 30,000	\$ -	\$ (30,000)
Summer Intersession	\$ -	\$ 10,000	\$ 10,000
Migrant Summer School	\$ 45,000	\$ 45,000	\$ -
subtotal	\$ 125,000	\$ 105,000	\$ (20,000)
<b>OFFICE OF PARTNERSHIPS - SEI</b>	\$ 400,000	\$ 400,000	\$ -
<b>TOTAL</b>	<b>\$ 778,100</b>	<b>\$ 505,000</b>	<b>\$ (273,100)</b>
<b>GRAND TOTAL</b>	<b>\$ 14,314,853</b>	<b>\$ 11,986,725</b>	<b>\$ (2,328,128)</b>
<b>TITLE IA ALLOCATION</b>	<b>\$ 12,517,605</b>	<b>\$ 11,891,725</b>	<b>\$ (625,880)</b>
<b>CARRYOVER</b>	<b>\$ 1,797,248</b>	<b>\$ 95,000</b>	<b>\$ (1,702,248)</b>
<b>TOTAL AVAILABLE</b>	<b>\$ 14,314,853</b>	<b>\$ 11,986,725</b>	<b>\$ (2,328,128)</b>
<b>SURPLUS/DEFICIT</b>	<b>\$ -</b>	<b>\$ (0)</b>	



# Board of Education

## Staff Report to the Board

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**Board Meeting Date:** February 17, 2015    **Executive Committee Lead:** Tony Magliano

**Department:** Facilities/Office of Schools/  
Enrollment    **Presenter/Staff Lead:** Judy Brennan

**SUBJECT: 2014-15 Enrollment Data Analysis**

### BACKGROUND

Each year, in accordance with policy 4.10.045-P, staff conducts an enrollment and capacity analysis of schools and programs. This memorandum summarizes enrollment trends across the district, and highlights locations where student populations are larger than school capacity or smaller than program targets.

A district-wide boundary review process will take place during 2015 and is expected to address most enrollment balancing issues beginning in fall 2016. In the meantime, a small set of schools and programs will experience capital or non-capital changes to manage overcrowding for the 2015-16 school year. Schools with small enrollment will be considered for additional resources through the upcoming budget and staffing process, to ensure equitable access to programs.

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### RELATED POLICIES / BOARD GOALS AND PRIORITIES

Policy 4.10.045-P

Board Goal: Portland Public Schools has safe, up to date learning environments for all students.

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### PROCESS / COMMUNITY ENGAGEMENT

The basic enrollment data analysis is an internal, mostly technical exercise. The process for identifying solutions to short-term overcrowding issues involved staff from multiple departments and included input received from principals, staff and community members from numerous schools.

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### ALIGNMENT WITH EQUITY POLICY IMPLEMENTATION PLAN

Right-sizing school enrollment is a key strategy to increase equitable program access for historically underserved students.

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**Reviewed and Approved by**  
**Executive Committee Lead**



### **BUDGET / RESOURCE IMPLICATIONS**

Capital resources described in the attached memo, including internal modifications to several school buildings, purchasing and installation of a two-classroom modular at Sitton and relocation of the Head Start program from Clark to Lane, were approved by the school board in Fall 2014 as part of a one-time request to address overcrowding.

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### **NEXT STEPS / TIMELINE / COMMUNICATION PLAN**

Planning is underway to implement the short-term overcrowding relief strategies described in the attached memo. Additional resources to provide equitable access to programs at under-enrolled schools will be considered as part of the upcoming annual budget and staffing process.

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### **QUESTIONS FOR BOARD DISCUSSION**

Staff will be available to respond to questions about the enrollment data analysis results and the short-term overcrowding relief strategies.

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### **ATTACHMENTS**

Enrollment Data Analysis memo  
Enrollment Data Analysis results by school



Judith A. Brennan  
Director

PORTLAND PUBLIC SCHOOLS  
Enrollment and Transfer Center

501 North Dixon Street • Suite 140 • Portland, OR 97227

## MEMORANDUM

**TO:** PPS School Board of Directors

**FROM:** Judith Brennan, Enrollment Director

**THROUGH:** Carole Smith, Superintendent  
Tony Magliano, Chief Operating Office

**DATE:** February 11, 2015

**RE:** **2014-15 Enrollment Data Analysis**

Each year, in accordance with policy 4.10.045-P, staff conducts an enrollment and capacity analysis of schools and programs. This memorandum summarizes enrollment trends across the district, and highlights locations where student populations are larger than school capacity or smaller than program targets.

A district-wide boundary review process will take place during 2015 and is expected to address most enrollment balancing issues beginning in fall 2016. In the meantime, a small set of schools and programs will experience capital or non-capital changes to manage overcrowding for the 2015-16 school year. Schools with small enrollment will be considered for additional resources through the upcoming budget and staffing process, to ensure equitable access to programs.

### District-wide enrollment trends

This is the sixth straight year of increased PK-12 enrollment in Portland Public Schools. Larger cohorts of students are advancing through elementary grades and will result in greater enrollment in middle and high school grades in the coming years. Longer-range forecasts expect approximately 6,000 additional students to be enrolled in PPS schools by the year 2025.

### PPS enrollment by grade: October 2013 versus October 2014

Year	PK	K	1	2	3	4	5	6	7	8	9	10	11	12	Total
2013	971	4244	4369	4082	3864	3906	3775	3547	3407	3349	3057	3055	2990	3482	48098
2014	880	4127	4302	4287	4041	3864	3865	3594	3428	3340	3137	3090	2946	3549	48459
Change	-91	-117	-67	205	177	-42	90	47	21	0	80	35	--44	67	361

While district-wide enrollment continues to grow, variation in enrollment patterns persists at all school levels and in each region of the district. As part of the annual analysis, enrollment at each school is compared to two relative measures: program size targets and amount of classroom space. Schools with significantly fewer students than the target number are considered under-enrolled, while schools with more teachers than classrooms are considered over-enrolled. A preliminary listing of all PPS neighborhood and focus option schools is attached. Please note some of the parameters that impact results: PPS PK and Head Start teachers and students are included, program size targets are not applied to focus option schools and, because of staffing complexities, classroom utilization is not calculated for high schools.

### 2014 PPS enrollment data analysis results

School type	Number of schools: (does not include focus options & alternative schools)	Under-enrolled: ES below 375 K-8 below 425 MS below 500 HS below 1200	Over-enrolled: ES/K-8/MS: At or above 100% utilization	Percentage of schools outside of enrollment targets	
				2014	Comparison to 2013
Elementary	26	5	8	13 of 26 schools, <b>50%</b>	Up from 4 under- & 6 over-enrolled
K-8	27	9	9	18 of 27 schools, <b>67%</b>	Up from 8 under- & 8 over-enrolled
Middle	9	2	0	2 of 9 schools, <b>22%</b>	Down from 4 under-enrolled
High	7	2	n/a	2 of 7 schools, <b>29%</b>	No change
<b>Total</b>	69	18	16	35 of 69 schools, <b>51%</b>	No change in under- & 2 more over-enrolled

One positive impact of enrollment growth is fewer middle schools where student populations are significantly below program targets. At the same time, there are greater numbers of schools with more teachers than classrooms.

Over-and under-enrollment challenges may stem from different causes and warrant different solutions. Under-enrollment in some locations is related to low-levels of support by neighborhood families. While the number of under-enrolled schools has grown, changes to the equity formula have helped bolster staff numbers at small schools with high percentages of historically underserved students. Grassroots outreach efforts aimed at increasing attendance by neighborhood students may be necessary, as well.

Conversely, over-enrollment at numerous schools has occurred because of increased attendance from neighborhood families, more arts and classroom teachers as a result of improved state and local

funding, and expansion of popular programs, such as immersion. However, many PPS buildings are small and sit on land parcels that cannot be expanded and funds for capital improvements reduce resources for teaching and learning. Boundary changes are viable options for right-sizing (balancing?) enrollment between overcrowded schools, but that strategy alone may not resolve enrollment challenges at under-enrolled schools. School grade structures and special program locations are important factors to consider when addressing both under- and over-enrolled schools.

### **Short-term enrollment balancing strategies**

We acknowledge and appreciate the willingness of many school communities to hold steady without enrollment/program changes next year, even though this means they will continue to experience some sacrifice and discomfort. At the same time, we recognize that there are a small set of schools that must have some relief in 2015-16, in order to maintain healthy and safe learning environments. Schools on this list are and have been experiencing one or more of the following forms of overcrowding:

- Not enough classrooms to provide one for each teacher who would normally have access to a full-sized classroom all day. In these cases, student to teacher ratios may increase, electives may have to move to non-standard instructional spaces, such as the cafeteria, and some teachers may have to share spaces.
- Not enough smaller spaces for instructional supports. Few of our older buildings have sufficient resource and support spaces for counselors, academic coaches, school psychologists, speech pathologists and others who provide direct support to students and teachers. With enrollment growth, more of these staff may have to share space or locate to spaces designed for other purposes, such as storage rooms, teacher work rooms, libraries, etc.
- Not enough common area spaces to for student lunches, assemblies, and other activities that involve the whole student population. Growing enrollment, may result in more lunch shifts, meaning some students may begin lunch at mid-morning while others are finishing lunch close to the end of the school day, which can impact the overall school schedule. Auditoriums and other common spaces may not be large enough to allow for whole-school functions, as well.

Below is a list of strategies approved by the Superintendent for implementation by fall 2015 at chronically over-enrolled schools, along with information about other options that were considered but not selected. Individuals from numerous schools and departments who contributed to this effort are listed at the end of this document and are available to provide additional information.

Capital funds for facility modifications will come from the one-time budget request approved in fall 2014. As noted earlier, additional resources to ensure equitable access to programs at under-enrolled schools will be considered through the annual budget and staffing process.

### **ACCESS 1-8 Academy/Beverly Cleary K-8 School, Grant Cluster**

**Minimal need for 2015-16:** One additional classroom to meet expected neighborhood growth at Beverly Cleary. ACCESS needs one to two additional classrooms to meet growth plan goals. Beverly Cleary is currently divided between three campuses, as all students will not fit on the main campus, Fernwood, or the school's traditional annex, Hollyood. Two Beverly Cleary grade levels are co-located

at the Rose City Park campus with ACCESS, a district-wide alternative program serving highly gifted students who have not been successful in mainstream schools.

**Non-capital options considered:** ACCESS: Limit new student enrollment. Beverly Cleary: Boundary change, voluntary transfers to Irvington, relocate Special Ed classroom, larger class sizes at one or more grade levels.

**Capital options considered:** Divide large classrooms at Rose City Park, add modular to Fernwood.

**Approved strategy:** A combination of voluntary transfers to Irvington and dividing one or more large classrooms at Rose City Park. Note that Beverly Cleary will still be spread across three campuses in 2015-16.

**Rationale for eliminating other options:** Modularity is costly and will not be needed in long-term. Special Education classroom is well established at Beverly Cleary. The District-wide Boundary Review Advisory Committee has stated concerns that boundary changes in advance of the district-wide process could impact the integrity of the overall process. Limiting ACCESS enrollment prevents students from receiving appropriate education.

**Equity consideration:** Moving the Special Education classroom would disrupt students who benefit greatly from stability.

#### **Chapman K-5 School, Lincoln Cluster**

**Minimal need for 2015-16:** One additional classroom to meet expected neighborhood growth (at least one additional classroom will be necessary in 2016-17).

**Non-capital options considered:** Voluntary transfers to Ainsworth, relocate Special Ed classroom, larger class sizes at one or more grade levels, move kindergarten to leased-space at Ramona.

**Capital options considered:** Add modular, improve common and Special Ed spaces.

**Approved strategy:** A combination of voluntary transfers and increased class sizes at one or more grade level.

**Rationale for eliminating other options:** Modularity is costly and may not fit on the site without significant additional changes. Ramona move impacts Head Start program, requires additional costs associated with split campuses. There is no nearby school with space to accept the Special Education classroom.

**Equity consideration:** Chapman serves the most low-income students in the Lincoln cluster. Moving the Special Education classroom would disrupt students who benefit greatly from stability.

#### **Creative Science K-8 School, including Head Start, Madison Cluster**

**Minimal need for 2015-16:** One additional classroom to meet CSS board approved growth plan.

**Non-capital options considered:** Relocate Head Start, limit entry grade slots for CSS.

**Capital options considered:** Add modular.

**Approved strategy:** Relocate Head Start program to Lane Middle School. Lane is located in a region of the district with a high rate of families who qualify for Head Start and there is space available at Lane.

**Rationale for eliminating other options:** Modularity is costly and will not be needed in long-term. Reducing size of CSS entry grade is counter to the growth plan approved by the school board in 2009.

**Equity consideration:** Head Start students are overwhelmingly poor and students of color. CSS serves a lower proportion of historically underserved students than the surrounding neighborhood schools.

### **Harrison Park K-8 School, Madison Cluster**

**Minimal need for 2015-16:** One additional classroom for expected neighborhood growth.

**Non-capital options considered:** Relocate Special Education program, increase class sizes at 1<sup>st</sup> grade.

**Capital options considered:** Add modular, remodel industrial arts space to create more functional classroom and resource rooms.

**Approved strategy:** A combination of remodeling industrial arts spaces and increasing average class sizes at 1<sup>st</sup> grade next year from 17 (average at K this year) to 23 will create more than the minimal number of spaces needed for the coming year.

**Rationale for eliminating other options:** Modularity is costly and will not be needed in long-term. Relocating Special Education classroom would be disruptive to a vulnerable population.

**Equity consideration:** Harrison Park serves a high number of students of color, students who receive ESL and Special Education services and students in poverty.

### **Kelly K-5 School, including Russian Immersion and Head Start, Franklin Cluster**

**Minimal need for 2015-16:** One additional classroom for expected Russian Immersion growth.

**Non-capital options considered:** Relocate or downsize rooms for Head Start, limit entry grade slots for Russian Immersion.

**Capital options considered:** Add modular.

**Approved strategy:** Head Start program will shift the required space for motor skills to a different location, freeing up a classroom.

**Rationale for eliminating other options:** Modularity is costly and will not be needed in long-term. Reducing size of Russian Immersion will have long-term effect on program integrity.

**Equity consideration:** Head Start students primarily low-income and students of color. Students in Russian Immersion also qualify for free and reduced-price meals at a rate above the district average. Most are native Russian speakers who would have fewer options to benefit from dual language program if slots were reduced.

### **Sitton K-5 School, Roosevelt Cluster**

**Minimal need for 2015-16:** One additional classroom for expected neighborhood growth (additional classroom needed in 2016-17).

**Non-capital options considered:** Relocate Head Start.

**Capital options considered:** Add modular.

**Approved strategy:** Add modular, which right-sizes Sitton to be large enough to support a PK-5 program.

**Rationale for eliminating other options:** Head Start program serves mostly neighborhood families and provides opportunity for families to be integrated into Sitton for an additional year.

**Equity consideration:** Head Start students are primarily low-income and students of color, as is the overall enrollment at Sitton school.

### **Skyline K-8 School, Lincoln Cluster**

**Minimal need for 2015-16:** One additional classroom for expected neighborhood growth.

**Non-capital options considered:** Reduce transfer slots.

**Capital options considered:** Re-purpose computer lab into a classroom.

**Approved strategy:** A combination of reducing transfer slots and re-purposing a computer lab into a classroom.

**Equity consideration:** Skyline is a very small building serving an isolated population that has a low proportion of historically underserved students. Reducing enrollment may reduce access to elective options.

#### **West Sylvan Middle School, Lincoln Cluster**

**Minimal need for 2015-16:** None required for overcrowding, community request to end split campus and have all students grades 6-8 attend West Sylvan campus.

**Non-capital options considered:** Split schedules, rotating 6<sup>th</sup> graders between east and west campuses.

**Capital options considered:** Interior changes to common areas to accommodate full population.

**Approved strategy:** Interior changes to common areas which will allow all 6-8 grade students to attend school on the West Sylvan campus next year.

**Rationale for eliminating other options:** Split schedules and student rotations would not accomplish the goal of all West Sylvan students together on a single campus.

**Equity consideration:** West Sylvan serves predominantly white students who do not qualify for free and reduced-price meals.

#### **Additional priorities**

Staff has also compiled lists of schools and programs facing overcrowding challenges that are not as acute as those described above, but that must be addressed as part of district-wide boundary review. The list includes siting new/expanding dual language programs and identifying appropriate locations for Multiple Pathways programs. The Space Utilization Committee will continue to investigate these and other emerging issues for future decisions.

Please contact me with any questions or concerns.

Attachments

Cc: Harriet Adair, Deborah Berry, Teri Brady, Scott Choate, Justin Dollard, John Ferraro, Teri Geist, Melissa Goff, Gretchen Hollands, Jon Isaacs, Eileen Isham, Sara King, Sherrie Knutsen, Kristie Lindholm, Karl Logan, Antonio Lopez, Lisa McCall, Paula McCullough, Dana Nerenberg, Mary Pearson, Jill Sage, John Walden, Amanda Whalen, Charlene Williams, David Wood



# Board of Education Informational Report

## MEMORANDUM

**Date:** February 11, 2015  
**To:** Members of the Board of Education  
**From:** Tony Magliano, Chief Operating Officer  
**Subject:** Solar Roof Lease Partnership between Portland General Electric and Portland Public Schools

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This Memorandum provides an update on a proposed solar roof lease between Portland General Electric and Portland Public Schools.

### Background

In November 2012, voters approved a District capital bond. Since then, the District has actively pursued opportunities to leverage bond fund expenditures with monies from other organizations. A partnership with Portland General Electric (PGE) for a solar energy project developed from this effort. Solar energy projects align with the PPS's 2012 Long Range Facilities Plan Guiding Principles of developing partnerships, embracing sustainability and demonstrating fiscal responsibility. Mutual interest in leveraging public and private funds with a benefit of clean air, educational opportunities and overall community well-being is of great value to the District, its students and supporters. There is also the potential to realize educational and environmental benefits associated with the installation of solar energy collection systems, through increased public and student awareness together with carbon emission reductions.

### Project Summary

This project comprises a 25 year roof lease agreement with PGE to install and operate approximately 1.2 Megawatts of solar photovoltaic (electric) panels on 6 PPS school sites listed below.

### Facilities Improved

- Arleta Elementary School
- Bridlemile Elementary School
- Hosford Middle School
- James John Elementary School
- Laurelhurst Elementary School
- Wilson High School

### Construction Timeline

June 21-August 20, 2015



## Term

25 years with Purchase Option

## License (lease) Fee

- Based on installed \$/ft<sup>2</sup> @ \$0.10/ ft<sup>2</sup>
- (est. 200,000 ft<sup>2</sup> @ \$12,000/year)
- Base lease rate = \$12,000/year
- Escalates at 1.93%/year
- Est. Project Total \$437,000
  - Monthly payments to PPS

## Benefits

The renewable power generated on-site is being used to power both the school as well as the community.

The Solar Facility provides renewable energy for PGE's customers, including PPS, and provides a financial benefit to PPS for hosting the array through payment of the License Fees.

PPS will receive, in the form of Renewable Energy Credits ("RECs"), twenty percent (20%) of the renewable attributes from the solar energy production of the Solar Facility.

The Solar Facility is estimated over its 25 year life to have the following equivalent environmental benefits<sup>1</sup>:

- Reduction of 13,927 Metric Tons of Carbon Dioxide
- Carbon Sequestered by 11,415 acres of U.S. Forest in one year
- CO<sub>2</sub> emission from 1,567,106 gallons of gasoline
- Annual greenhouse gas emissions from 2,932 passenger vehicles

<sup>1</sup> Source EPA.GOV – Greenhouse Gas Equivalencies Calculator @ 20,197,100 kWh over 25 years

## Education and Community Resources

*PGE in collaboration with its solar installation contractor and Bonneville Environmental Foundation ("BEF") Solar 4R Schools to provide a portfolio of educational training and resources that will include the following:*

- Portland Metro Educators' Workshop that will include renewable energy STEM professional development for educators, science kits, and Next Generation Science Standards-aligned classroom activities and lesson plans. Topics may include:
  - Fundamentals of energy
  - Fundamentals of electricity
  - Solar energy and PV technology
  - Wind energy and technology
  - Integrating photovoltaic (PV) system data in the classroom
  - Renewable energy classroom activities
  - Conducting engineering challenges
  - Using the science kit materials
  - Using the resources available at Solar4RSchools.org
- Interactive touch screen kiosk and data integration and display

- In-classroom support in partnership with Solar Oregon utilizing volunteer solar industry professionals
- PPS receives:
  - Interactive project kiosk or similar display system with solar with system photos, project description, live energy production data, and information on renewable energy and how a solar photovoltaic system works for the school that hosts the solar installation
  - Real-time, online access to PV system performance data, allowing educators to download, track, graph, and analyze the system's energy generation data for educational purposes
  - Lifetime membership to the Solar4RSchools.org renewable energy learning community for participating educators, including interaction with live solar energy data from 200+ schools nationwide
- Participating educators to receive:
  - Renewable energy education training for educators in the Portland Metro area school districts (\$1,250 value per educator) for up to 20 educators per training session
  - Professional Development Units or substitute reimbursement for participating area teachers and schools
  - Interactive, hands-on, inquiry-based STEM education teaching materials, science kits and classroom activity guides for participating teachers. Each science kit's value is \$750
  - Lifetime membership to the Solar4RSchools.org renewable energy learning community, including interaction with live solar energy data from 200+ schools nationwide
  - Real-time, online access to PV system performance data, allowing educators to download, track, graph, and analyze the school rooftop PV system's energy generation data for educational purposes
- Participating schools to receive:
  - Interactive project kiosk with system photos, project description, live energy production data, and information on renewable energy and how a solar photovoltaic system works
  - Local operations and maintenance support of the kiosk and data display system 10 years
  - Automated email trouble alerts, with direct follow up with relevant PPS and PGE staff
  - Lifetime membership to the Solar4RSchools.org renewable energy learning community for participating educators, including interaction with live solar energy data from 200+ schools nationwide
  - Real-time, online access to PV system performance data, allowing educators to download, track, graph, and analyze the system's energy generation data for educational purposes
  - Value ~\$150,000

### PGE General Responsibilities

PGE shall, at its sole expense, purchase and provide all equipment, materials, supplies and labor for, and construct, install, operate, maintain and repair the Solar Facility.

PGE is responsible for all damages in conjunction with installation, operation, maintenance, repair and replacement of the solar facilities.

This project supports PPS Board Policies:

- A. Aligns with Board policy 3.30.080-P on Resource Conservation.
  - a. Section (2) Paragraph (a): New resource conservation technologies and alternative energy sources
  - b. Section (3): The plan shall also include procedures for the Director of Facilities and Assets Management to administer the plan to maintain resource conservation, efficient buildings and provide training and recognition for students, custodians, teachers, principals and others as appropriate to ensure conservation accountability
- B. Aligns with Board policy 3.30.082-P on Environmentally Sustainable Business Practices.
  - a. Section (1) Paragraph (a): Minimizing its impact on the use of finite natural resources and the environment as a whole
  - b. Section (2) Paragraph (j): Promote curriculum exploring the relationship of sustainable principles to the environment
- C. Aligns with Board policy 6.30.030-P on Education Student Training Programs
- D. Aligns with Board policy 6.10.013-P on Career Education – Learning Opportunities
- E. Aligns with Board policy 8.70.044-P on Capital Asset Renewal Funds and Plans
- F. Aligns with Board policy 8.80.010-P on High Performance Facility Design
- G. This action applies to District Strategic Framework Foundational Elements Stable Operating Modes
- H. The installation of these solar photovoltaic systems aligns the District with its ongoing sustainability and energy conservation efforts

Timeline

Item	Date	Responsible Party
PPS Solar Project Kickoff - Arleta	February 19	All
PPS Board Meeting + Project Presentation	February 24	All
PGE issues Notice to Proceed to contractor(s)	February 25	PGE
Agreement(s) Signed - Press Release(TBD)	February 25	PPS/PPS
Project Design	March-May	PGE
Contractor Obtain Permits / Long Lead Material Proc.	May 11	PGE
Mobilization	June 1	PGE
Construction – 8 Sites	June 15	PGE
Mechanical Completion	TBD	PGE
Commissioning – 8 Sites	TBD	PGE
Synchronization and Acceptance Testing	TBD	PGE
Substantial Completion – 8 Sites	TBD	PGE
Final Completion – 8 Sites	TBD	PGE
Demobilization	TBD	PGE
PPS Quality Assurance	August 17-21	PPS
Placement in Service – 8 Sites	August 24	PGE