



## PORTLAND PUBLIC SCHOOLS

### OFFICE OF FINANCE

501 North Dixon Street / Portland, OR 97227

Telephone: (503) 916-3529

**Date:** October 15, 2019

**To:** School Board

**From:** Cynthia Le, Chief Financial Officer  
Jordan Ely, Director of Budget and Analytics  
Nicole Bassen, Manager of Budget

**Subject:** Appointment of CBRC Members

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### **BACKGROUND**

Each year, the Board of Education appoints a Community Budget Review Committee (CBRC) to assist in the annual budget process. The CBRC reviews, evaluates, and makes recommendations to the Board of Education (Board) regarding the Superintendent's Proposed Budget and other budgetary issues identified by the CBRC or the Board. The CBRC also monitors and advises the Board on the allocation and expenditure of Local Option Levy funds.

The CBRC is composed of eight to twelve volunteer members appointed by the Board to two-year terms. The CBRC typically meets on a monthly basis during the course of the budget development season.

There are currently 7 vacant positions on the Committee, and applications for the vacant positions were accepted through September 28, 2019. Staff received 15 applications and with a goal of achieving a diverse, district-wide representation, evaluated the candidates based on their experience with the district and ability to dedicate the amount of time necessary. Staff are working on identifying a student representative. The Board is being asked to appoint the candidates from the table in Section VIII to fill the vacant positions.

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

NA

### **ANALYSIS OF SITUATION**

Four people independently evaluated 15 applications and used the following criteria:

- Geographic Area
- Equity Focus
- Volunteer/District Highlights
- Strengths aligned with district priorities and CBRC deliverables

The four individuals who evaluated the applications were Sara Kerr, Co-Chair CBRC, Cynthia Le, CFO, Jordan Ely, Budget Director, and David Stone, Budget Fiscal Services Associate. Attached are the applications of the seven recommended candidates.

**STAFF RECOMMENDATION**

From the 15 total applicants, staff recommends the following candidates. Applications for the 7 recommended candidates are attached.

\* Indicates former CBRC Member re-applying

Candidate Last Name	Candidate First Name	School Affiliation(s)	Equity Focus	Volunteer / District Highlights
Kerr *	Sara	Rose City Park	RCP Equity Team	RCP Playground Committee, PTA, Walk/Bike to School Chair.
Kirchner *	Roger	Glencoe, Mt. Tabor, Franklin		PTA, Mt. Tabor & Franklin Site Councils, CBRC Member, Franklin Design Advisory Group, Local Option Levy and Capital Bond Volunteer.
Phillips *	Irina	Grant		PTA, budgeting at PGE.
McAuley *	Judah	MLC		CBRC Member, legislative liaison for Business for a Better Portland.
Samuels	Jennifer	Grant	RESJ/Equity Lens Work	Classroom Volunteer, Read-Together Initiative, Ad-Hoc Committee on Biennium Budgeting, School Districts Project Work Experience.
Posey	Leesha	N/A	Advocate for Black/Indigenous Community	District-wide Boundary Review Advisory Committee Member, Private School Board Member, former teacher.
Salter *	Betsy	Glencoe, Mt. Tabor, Franklin		PTA, CBRC Member, PPS Community Involvement Committee, SMART Reading Volunteer, Our Portland/Our Schools Bond Support Co-Founder, former DDSD Reading Assistant.

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

 (Initials)

**ATTACHMENTS**

- A. Recommended Candidate Applications



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PORTLAND PUBLIC SCHOOLS  
COMMUNITY BUDGET REVIEW COMMITTEE (CBRC)

BY: Budget Office

Application for a two-year term, ending June 30, 2021.

Applicant Name:	Sara Kerr	Date:	8/5/2019
Home Address:			
E-Mail Address:			
Primary Phone:			

Professional Background or Budget Experience:

**\* Vice President for Education Policy Implementation for nonprofit Results for America, with responsibility for fundraising and managing a multi-million dollar budget** that includes overseeing multiple grants and subgrants, consulting contracts, and partnerships with state education agencies and local school districts; substantive focus of body of work I oversee is supporting the public sector’s use of data and evidence to make budget and policy decisions.

**\* Former Chief Performance Officer at the Delaware Department of Education with responsibility for overseeing the agency’s accountability and performance management functions; oversaw implementation of DE’s \$119M Race to the Top grant**, including ensuring all deliverables were met on time and on budget; maintained “on-track” rating with the U.S. Department of Education and developed an innovative delivery system to monitor progress and impact of funded reforms at the state and local school district levels. Direct report to State Secretary of Education.

**\* Education policy analyst with the Council of the District of Columbia, with responsibility for advising City Council members on all education-related issues**, including budget oversight of DC Public Schools and the Office of the State Superintendent of Education.

Please list all areas of service and/or volunteer activities with Portland Public Schools (i.e., Site Council, PTA, LSAC, Board, Superintendent or District Committees, etc.):

\* Active participant in Rose City Park Elementary community; in 2018-19, co-chaired PTA’s Volunteer Coordinator position; organized Walk/Bike/Roll to School Day; co-chaired Playground Committee and active voice on Equity Team.

\* CBRC member for two-year term (2017-18 and 2018-19; co-chaired in 2018-19)

Describe other relevant experience:

As a former educator, policymaker, and nonprofit leader, I have a unique and deep understanding of both the policymaking and implementation processes, and more than 15 years of experience helping education leaders make data-driven, evidence-based decisions with take into account factors such as cost, impact, and degree of challenge to implement. I’ve participated in the budget formation and oversight processes, and have expertise in delivery – a “fancy” term for outcomes-focused implementation. I am the product of public schools, the

daughter and granddaughter of public school educators, a deep believer in public education, and have a firm and unwavering commitment to ensuring every student, regardless of race, socioeconomic status, or zip code, has access to equitable educational opportunities. Ensuring the local school system has an adequately and equitably resourced operating budget is critical to honoring that commitment.

Reason for applying or interest in serving:

When I moved to Oregon just shy of four years ago and started researching the local education landscape, I made a commitment to myself that I am eager to follow through on: *I want to work in and serve the community in which I live.* I also know from experience that budgets are blueprints for organizational priorities. Serving on the CBRC strikes me as an opportunity to leverage my experience and expertise while fulfilling a personal goal of serving and strengthening my local community. I am also energized by the current district leadership and eager to help be a part of the "solution." I think a great deal of work remains in order to rebuild fairly eroded trust in our city's public education system, and an important step is a transparent and equitable budget process. I am committed to representing my fellow residents and holding PPS to account for strategically and equitably directing resources towards our city's most pressing priorities and to ensuring that dollars spent are leading to measurable impact for students.

If you have children in PPS, please specify the number of children, grade levels and schools attended:

I am the proud mama of two daughters – one who will be in first grade at Rose City Park Elementary School this fall and a second who is 3.5 years old at attends preschool at Small Wonders School.

Are you able to commit to regular attendance at CBRC meetings at least on a monthly basis, and more frequently during the two-month budget process?

Yes



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**PORTLAND PUBLIC SCHOOLS  
COMMUNITY BUDGET REVIEW COMMITTEE (CBRC)**

BY: Budget Office

**Application for a two-year term, ending June 30, 2021.**

Applicant Name:	Roger Kent Kirchner	Date:	18 JUL 19
Home Address:			
E-Mail Address:			
Primary Phone:			

Professional Background or Budget Experience: Public Service – Alumni Director, Willamette University; State of Oregon (Land Conservation and Development Commission [LCDC]); Asst Administrator, Workers’ Compensation Board; Spec Asst to State Treasurer; retired from United States Postal Service [USPS].

Currently, among those serving on CBRC, I’ve served the most years.

Please list all areas of service and/or volunteer activities with Portland Public Schools (i.e., Site Council, PTA, LSAC, Board, Superintendent or District Committees, etc.):

PTA/PTSA President @ Glencoe Elementary & Franklin High School; PTA Newsletter Editor @ Mt. Tabor Middle School; Region 2 Director for OR PTA (Region 2 is PPS with 75+ chapters); have attended most PPS Board and Committee meetings the last 6 years. (PTA is PPS’ largest constituency save for the students themselves.) I served on Site Councils at MTMS and Franklin for multiple years. Member of the Community Budget Review Committee [CBRC] for over a decade working with Several superintendents and Budget Directors and CFOs. Volunteer on PPS Local Option Levy and Capital Bond campaigns. Active in lobbying the Legislature for increased funding for K-16 education. Served on Franklin’s Design Advisory Group redesigning the future, now the new Franklin. Frequent volunteer at Franklin.

Describe other relevant experience: As Alumni Director at Willamette University, I staffed three Associations: College of Liberal Arts; Parents’; College of Law and participated in the University’s development program. At LCDC, I directed its Public Information Program, edited its newsletter, wrote gubernatorial correspondence and speech material; speech writer for Commissioners; para-legal to Hearings Officers prior to the creation of the Land Use Board of Appeals. I served as the Assistant Administrator at the Workers’ Compensation Board

supervising the clerical support to Hearings Officers and the statewide scheduling of hearings and coordination of hearings reporting (court reporting). I provided liaison between the Board and practicing workers' comp attorneys. At the State Treasury, I served as the Special Assistant to the Treasurer; supervised the State's Divestiture Program (program to divest State equity holdings in South Africa due to its apartheid policies). I served as the Treasury's Public Information and Publications Officer; writer and editor. – I attended Hosford, then a K-8; graduated Cleveland High School. Oldest daughter graduated Grant HS; youngest graduated Franklin HS having attended Glencoe and Mt. Tabor. – My brother graduated Cleveland HS. Both parents taught in PPS; father at Eliot and Bridlemile, mother at Boise, Woodstock, Duniway, Grout.

Reason for applying or interest in serving: I take my service on CBRC seriously. During my time of service, I've missed only 4 meetings. Understanding the State's education budgeting, funds accounting, various funding formulae and systems, combined with Federal titles, takes time to understand, yet alone master. There isn't a year that goes by when one doesn't learn something more. – I firmly believe CBRC plays a vital role in helping a lay Board of Directors to better understand its annual budgeting responsibilities.

If you have children in PPS, please specify the number of children, grade levels and schools attended: Both of my daughters have now graduated high school. The eldest is a successful executive in a major loss-management firm. The youngest graduated the Honors College at PSU a full year ahead of her class with a double-major and two minors; currently attends Lewis & Clark Law School. Contributing to her ability to graduate college early were the AP credits she earned at Franklin High School

Are you able to commit to regular attendance at CBRC meetings at least on a monthly basis, and more frequently during the two-month budget process?

Absolutely!

SEP 09 2019

**PORTLAND PUBLIC SCHOOLS  
COMMUNITY BUDGET REVIEW COMMITTEE (CBRC)**

BY: Budget Office

**Application for a two-year term, ending June 30, 2021.**

Applicant Name:	Judah McAuley	Date:	7/21/2019
Home Address:			
E-Mail Address:			
Primary Phone:			

Professional Background or Budget Experience:

Director of Engineering for a software company, responsible for overseeing and a department of 20 and managing the budget for that department and all technology expenditures for the entire company.

Please list all areas of service and/or volunteer activities with Portland Public Schools (i.e., Site Council, PTA, LSAC, Board, Superintendent or District Committees, etc.):

Current member of the CBRC

Describe other relevant experience:

Legislative liason to the Oregon Legislature on corporate tax reform and education funding for Business for a Better Portland

Reason for applying or interest in serving:

The past two years on the CBRC have been a challenging time for the district but I've been hopeful about the planning and staffing efforts along with a greater commitment from the legislature to properly fund K-12 education, so I am looking forward to seeing the next phase of the work through in establishing a stable, professional budget that reinforces district vision.

If you have children in PPS, please specify the number of children, grade levels and schools attended:

One child, 7<sup>th</sup> grade, at MLC.



Are you able to commit to regular attendance at CBRC meetings at least on a monthly basis, and more frequently during the two-month budget process?

Yes I am.



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COMMUNITY BUDGET REVIEW COMMITTEE (CBRC)

BY: Budget Office

Application for a two-year term, ending June 30, 2021.

Applicant Name:	Irina Phillips	Date:	08/29/19
Home Address:			
E-Mail Address:			
Primary Phone:			

Professional Background or Budget Experience:

MS in Economics, working on budgets at PGE, serving on several Boards and reviewing the budgets then, experience working as a Chief Accountant for several venture companies.

Please list all areas of service and/or volunteer activities with Portland Public Schools (i.e., Site Council, PTA, LSAC, Board, Superintendent or District Committees, etc.): Grant HS PTA

Describe other relevant experience: professional experience working for the State and reviewing financial statements and proforma of Pacific Power, NW Natural, PGE, Idaho Power, Avista, Cascades Natural Gas, Frontier Communications, Verizon, City of Albany

Reason for applying or interest in serving: having children at PPS

If you have children in PPS, please specify the number of children, grade levels and schools attended: one current junior at Grant HS, two elder children graduated from Grant in 2018,

Are you able to commit to regular attendance at CBRC meetings at least on a monthly basis,

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**Applications due by September 28, 2019 to:** Portland Public Schools - Budget Office  
501 N. Dixon Street - Portland, Oregon 97227 | FAX (503) 916-2209 | email: dlstone@pps.net

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BY: Budget Office

**PORTLAND PUBLIC SCHOOLS  
COMMUNITY BUDGET REVIEW COMMITTEE (CBRC)**

**Application for a two-year term, ending June 30, 2021.**

Applicant Name:	Christine Pitts	Date:	09/6/19
Home Address:			
E-Mail Address:			
Primary Phone:			

**Professional Background or Budget Experience:**

*Bio:*

*I am a Policy Advisor at NWEA. As an Oregonian, raised by a multicultural family of educators in Coos Bay, I bring a decade of progressive strategic leadership experience, a transformational vision, and analytic skill to crafting state education policy. An educator, leader, and researcher by training, I have conducted legislation, governance, and policy analyses on a wide array of education issues primarily using social network analysis and mixed methods research. In addition, I am a facilitative leader who deeply understands and co-constructs partnerships and convenings across diverse stakeholder groups. In addition to my teaching, research, and policy experience, my roles include work in (a) strategic planning, (b) coalition building, (c) legislative proposal development, (d) project leadership, and (e) grant funding proposal development. I currently collaborate and coordinate across policymakers and state leaders to investigate and advocate for policies that prioritize equity in education.*

*Professional background:*

- *Education Policy Advisor (NWEA)*
  - *Co-construct and execute strategic planning initiatives for business and policy purposes in schools, districts, and nonprofit settings.*
  - *Develop and execute an organization-wide budget for policy and advocacy*
- *Research Associate (EPIC)*
  - *Secured and managed an annual budget of \$1M/ year across three school districts for 3 years;*
  - *Implemented and evaluated a \$4M federal grant across 3 districts and school leadership teams, 30 middle school staff members, and more than 2,000 students a federally funded grant*
  - *Tested and published the reliability and validity of measures of student engagement, as well as classroom observation tools*
- *Graduate Researcher (UO)*
- *Policy Intern (Chief Education Office)*
- *Title I District Budgeting (4J)*
  - *Provided actionable and research-based policy recommendations that aligned political, social, and policy challenges;*
  - *Reported on findings at board and leadership meetings;*
  - *Title 1 districtwide budget reporting;*
- *Teacher and Reading Specialist (4J)*
- *2<sup>nd</sup> and 3<sup>rd</sup> grade teacher (Greenville, NC)*

Please list all areas of service and/or volunteer activities with Portland Public Schools (i.e., Site Council, PTA, LSAC, Board, Superintendent or District Committees, etc.):

- *Site Council (Laurelhurst Elementary)*
- *PTA Member (Grout Elementary)*

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Describe other relevant experience:

Reason for applying or interest in serving:

*Fiscal decision making is an overlooked facet of education policy that can truly advance equity, diversity, and inclusion in a school district. I am personally proud that my kids attend Portland Public Schools because I know they are surrounded by a school community who values the diversity that makes their school strong. However, my kids live in a world of privilege because they are white and able-bodied, and I know that their experience does not represent the systemic barriers to success that our most racially/ ethnically and culturally diverse students face. It is important to note that in FY2019 81% of PPS revenues were from property taxes and the State of Oregon, indicating that PPS is in many ways funded by **me, my neighbors, and my community**. As such, I want to serve on the CBRC to expand the context by which fiscal decisions are made from considering all students to considering each individual student. This committee provides me the opportunity to take action, highlight the assets of our most diverse communities in Portland, build transparency around budgeting, empower the voices of my neighbors who are not heard by leadership, and hold this policy lever accountable for serving kids, families, and communities.*

If you have children in PPS, please specify the number of children, grade levels and schools attended:

*I have four children. Two of my children are in daycare/ preschool. Two of my children attend Grout Elementary School. One of them is in 3<sup>rd</sup> grade and the other is in 2<sup>nd</sup> grade.*

Are you able to commit to regular attendance at CBRC meetings at least on a monthly basis, and more frequently during the two-month budget process?

*Yes, I am able to commit to regular attendance at CBRC meetings on a monthly and possibly more frequently, if needed.*



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PORTLAND PUBLIC SCHOOLS  
COMMUNITY BUDGET REVIEW COMMITTEE (CBRC)

BY: Budget Office

Application for a two-year term, ending June 30, 2021.

Applicant Name:	Leesha Posey	Date:	9/27/2019
Home Address:			
E-Mail Address:			
Primary Phone:			

Professional Background or Budget Experience:

**Please see attached resume.**

Please list all areas of service and/or volunteer activities with Portland Public Schools (i.e., Site Council, PTA, LSAC, Board, Superintendent or District Committees, etc.):

- **District Wide Boundary Review Advisory Committee (DBRAC 2016-2017)**

Describe other relevant experience:

- **Former classroom teacher D.C. Public Schools**
- **Portland Adventist Elementary School Board member (current)**
- **Independent bookkeeper for contractors of color and other small businesses**

Reason for applying or interest in serving:

**As a proud former student of Portland Public Schools, it is important for me as an adult, to give back to the community that gave so much to me during my formative years. Serving on civic committees and boards such as the Community Budget Review Committee affords me the opportunity to do so through targeted and impactful means. I am committed to showing up and advocating for our students and families, specifically for black and indigenous communities. As a district and a city, our institutions, processes, policies and decision making must be more reflective of the population of the whole city and those that have been historically marginalized in these structures.**

If you have children in PPS, please specify the number of children, grade levels and schools attended: **N/A**

Are you able to commit to regular attendance at CBRC meetings at least on a monthly basis, and more frequently during the two-month budget process? **Yes**

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BY: Budget Office

**PORTLAND PUBLIC SCHOOLS  
COMMUNITY BUDGET REVIEW COMMITTEE (CBRC)**

**Application for a two-year term, ending June 30, 2021.**

Applicant Name:	Betsy Salter	Date:	09/28/2019
Home Address:			
E-Mail Address:			
Primary Phone:			

**Professional Background or Budget Experience:**

I've served on the CBRC for the past several terms.

**Please list all areas of service and/or volunteer activities with Portland Public Schools (i.e., Site Council, PTA, LSAC, Board, Superintendent or District Committees, etc.):**

Glencoe ES, MTMS and Franklin HS PTAs (various Board positions at each school). FHS Site Council.

Before serving on the CBRC I participated on a PPS Community Involvement Committee (name may have changed since then).

**Describe other relevant experience:**

I was a co-founder of the Our Portland, Our Schools NGO that lead the effort to build community support for passing the 2012 PPS School Bond.

I was a Start Making A Reader Today (SMART) Volunteer Coordinator for a couple of years in the mid-2000's followed by a couple of years as a DDSD Reading Instructional Assistant.

**Reason for applying or interest in serving:**

I would like to build on the knowledge and experience I have gained as a returning CBRC member to help the CBRC be as effective and impactful as possible. I would like PPS to be a national leader in providing all students with a high quality and well rounded education regardless of their zip code.

**If you have children in PPS, please specify the number of children, grade levels and schools attended:**

My daughter is currently a thriving Sophomore at the University of Oregon. She had an excellent education starting in Kindergarten at Glencoe ES, MTMS and Franklin HS.

(continued on Page 2)

**Are you able to commit to regular attendance at CBRC meetings at least on a monthly basis, and more frequently during the two-month budget process?**

Yes. I believe my past years of serving on the CBRC demonstrate my commitment to be a full participant on the committee.



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BY: Budget Office

**PORTLAND PUBLIC SCHOOLS  
COMMUNITY BUDGET REVIEW COMMITTEE (CBRC)**

**Application for a two-year term, ending June 30, 2021.**

Applicant Name:	Jennifer Samuels	Date:	9/25/2019
Home Address:			
E-Mail Address:			
Primary Phone:			

Professional Background or Budget Experience:

- 22 years non-profit experience (14 in education non-profits)
- 20 years responsible for developing, presenting, managing multiple budgets
- 10 years board member experience, multiple boards
- Teaching certificate (CA); MA in English

Please list all areas of service and/or volunteer activities with Portland Public Schools (i.e., Site Council, PTA, LSAC, Board, Superintendent or District Committees, etc.):

- Classroom and field trip volunteer
- Measure 26-48 (2003); worked to pass 3-year tax for school funding
- 2015: invited by Superintendent to provide feedback (ad hoc committee) on biennium budget allocation plans
- 2014-16: invited by PPS leadership to participate in development of literacy curriculum/plans
- 2013-2017: lead and co-lead collective impact project in PPS (Read Together Initiative)

Describe other relevant experience:

- Extensive Racial Justice / Racial Equity work (professional and personal), particularly centered around public education
- Advocated/lobbied legislators for passage of SSA (and predecessor SB214)
- Participation in multiple collective impact projects working to achieve collective impact (school districts, government, community partners).
- Extensive strategic planning experience, including school district projects and systemic work
- Strong committee / group work expertise and ethic

Reason for applying or interest in serving:

- Guiding commitment to achieve equitable education (eliminate disparities) working through a Racial Justice / Racial Equity lens
- Personal interest in seeing maximum funds allocated to best serve students experiencing disparities in education outcomes

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If you have children in PPS, please specify the number of children, grade levels and schools attended:

1. Freshman at Grant High School
2. 1 Grant High alum

Are you able to commit to regular attendance at CBRC meetings at least on a monthly basis, and more frequently during the two-month budget process?

Yes.