

BOARD OF EDUCATION

Portland Public Schools
STUDY SESSION
November 10, 2014

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. | <u>PUBLIC COMMENT</u> | 6:00 pm |
| 2. | <u>QUARTERLY UPDATE: BOND ACCOUNTABILITY COMMITTEE</u> | 6:20 pm |
| 3. | <u>QUARTERLY UPDATE: CAPITAL IMPROVEMENT BOND</u> | 6:50 pm |
| 4. | <u>SECOND READING: COMPLAINT POLICY</u> – <i>action item</i> | 7:10 pm |
| 5. | <u>PRESENTATION: SUPERINTENDENT'S ADVISORY COMMITTEE ON ENROLLMENT AND TRANSFER</u> | 7:45 pm |
| 6. | <u>UPDATE: ACHIEVEMENT COMPACTS</u> – <i>action item</i> | 8:45 pm |
| 7. | <u>BUSINESS AGENDA</u> | 9:15 pm |
| 8. | <u>ADJOURN</u> | 9:30 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.

MEMORANDUM

Date: November 10, 2014
To: Members of the Board of Education
From: Bond Accountability Committee (BAC)
Subject: 7th BAC Report to the Board

Background

In the November 2012 election, voters approved a \$482M capital improvement bond for Portland Public Schools. The PPS Board appointed a Citizen Bond Accountability Committee to monitor the planning and progress of the bond program relative to voter-approved work scope, schedule and budget objectives.

Recent Activities

The BAC met on October 15 at Concordia University. As is the case with all meetings, it was publicly noticed and open to the public. Public comment was received. OSM staff continues to be very helpful and supportive of the process, and demonstrates a consistent commitment to transparency and clarity in all dealings with the BAC.

Gary Withers of Concordia and Jen McCalley, Assistant Principal at Faubion, demonstrated the unique synergy between the college and school during their presentation. They increased our excitement over this one-of-a-kind partnership, and will continue to follow progress with great interest. The Disposition and Development Agreement between PPS and Concordia is expected to be ready for approval shortly. Schematic design is underway again based on an estimated commitment of \$15 million from Concordia, which will lead into an application for a Conditional Use Permit from the City.

We received reports on the design status on Roosevelt and Franklin High Schools, completion of Summer 14 work (IP14), and planning for Summer 15 work (IP15). We also learned about fire alarm, tenant improvement, and site improvement work at Marshall High School in preparation for Franklin students in 2015.

The project teams at all 12 schools in IP 2014 are to be congratulated. This work, with a revised budget of \$19.2 million, was even more challenging than the previous summer's program, requiring more oversight, with only 63 calendar days available. (Except, of course, that work on elevators at 3 of the schools will continue during the school year with a summer 2015 completion.) Work at all 12

schools was completed on time and only about one-half of the project contingencies were expended.

Design teams are hard at work on the IP15 program. Work at 8 schools with a budget of \$12.5 million is planned, along with additional Science Classrooms and ADA upgrades (\$2.6 million) at an additional 19 locations.

Staff also reported on progress on the excellent recommendations made by the Performance Auditors. Work on several has been completed, and we will continue to monitor. We will meet again with the auditors next week to discuss issues for their next round of assessment.

Current Issues

Schedules. Staff has continued to provide detail and transparency on each of the project schedules, and the format used has proved to be very helpful to us. Again, we appreciate staff's responsiveness to our requests in this regard.

Both Roosevelt and Franklin designs are significantly behind the Baseline Schedule, as reflected by the "red" report at the schematic design level in staff's Balanced Scorecard. These delays have many causes, including changes in school capacity requirements, the extensive public outreach and involvement processes, and discussions over the "additional criteria".

Franklin's design development phase is now complete, and the first construction bid package is planned for late January. Contractor mobilization has slipped from March to June; this doesn't cause too much concern, however, since the work that could have been accomplished before school's out was limited. We look forward to seeing a more detailed construction schedule (including permitting) that, we hope, will minimize the early negative schedule impacts that have been suffered.

Design development at Roosevelt is further behind, and the first bid package is set for early March. However, a phased permitting process is planned to generally maintain the original construction start date. Meetings with the City have caused the team to revise the original phasing plan due to occupancy concerns. This, along with additional enrollment at the school, will require temporary facilities to be necessary. The plan calls for Phase 1 (new Gym/Classroom Wing/Theater/Renovated Building for New Arts & Media Center) to be complete for school opening in 2016, and Phase 2 (full renovation of Main Building) will be complete for 2017 opening. Sitework and demolition will continue into the fall of 2017.

Again, we look forward to seeing more detailed construction phasing schedules (including permitting).

Work on the fire alarm system at Marshall is running behind the original schedule but, at 70% complete, the work will be done in plenty of time for the Franklin move-in next summer.

Yet another major project will shortly be in the mix. Selection of a design team for Grant High School will take place in the 2nd quarter of 2015.

Budget. Staff has continued to provide budget information to us in a transparent format.

The total program budget now sits at \$522 million, having increased since July by \$8 million approved by the Board for additional criteria at the high schools and a \$15 million estimated commitment from Concordia. Of course, it is still hoped that the \$8 million will ultimately be funded out of the Bond Premium, which remains at \$13.9 million.

We will all know a great deal more about the budget next time we meet. The Guaranteed Maximum Price (GMP) is due for Franklin by the end of the year, and for Roosevelt shortly thereafter. These will represent a significant transfer of budget risk from the District to the contractors, allowing us to have a far better gauge of the condition of our budgets.

Although on an entirely different scale, the recent budget experience on IP14 includes both good news and bad news. On the negative side, it appears that market conditions may be causing price increases. However, the District's project contingencies held up very well through construction, and will return some savings to the program. How this translates to the high schools is yet to be seen.

Equity. Staff reports on student involvement remain encouraging. The Board received some detail in the August OSM report.

OSM has settled on a reporting metric for student involvement to be included in the Balanced Scorecard. Instead of trying to report by project, it will now report by year since many activities are not directly project-based. As you will see from the report, 2013 was a learning experience with significant improvement in 2014. We will continue to monitor and encourage student involvement.

The use of MWESBs continues to be a challenge in some ways. However, in sum, the program report payments to date to MWESB firms amount to almost \$3.1

million, representing 9% of total payments. Contractors still lag behind, a result of the fact that all work to date has been awarded on a low bid basis with only aspirational goals applied. We continue to expect this percentage to increase as the high school work gets under way.

In total, consultants are meeting the District's 18% goal, which is certainly impressive. However, a drill-down shows that there is certainly room for further improvement. All of the IP work has exceeded the goal, but the other individual projects are falling short at this point. We will continue to remind staff that each of those consultant teams were evaluated and partly selected on their commitment to meeting the goals, so we expect improved performance.

Other. During the almost two years into the bond program, the BAC has worked hard to report on areas that have seemed to be most important to the Board. Inevitably, those have largely been focused on work scope, schedule, and budget objectives.

We were reminded through public testimony during our meeting, however, that our charter is broader, and we agree that more attention to other areas is appropriate. We have some concerns, though perhaps not the same, about the effectiveness of the Design Advisory Committees and will ask staff to report on that subject. We may also suggest this as a subject of interest to the performance auditors.

We will also work again with staff in an effort to find an effective way of reporting on the other key elements of our charter (sustainability, historic preservation, partnerships, etc.). Any suggestions from the Board would be welcomed.

Summary

It has been another good quarter for the bond program, with impressive performance on the IP14 work and significant progress on the high school planning and design. Of course, we remain concerned about management of future schedule, budget, scope and quality impacts from the high school program delays to date. Assertive risk management strategies should be employed to maintain control, and we will be looking to staff to continue its reporting on these at our next meeting.

We remain impressed by the quality and professionalism of OSM staff as well as the design and construction teams, and thank the Board for this opportunity to serve and play a part in what we still expect will be a very successful bond program.



Board of Education Informational Report

MEMORANDUM

Date: November 10, 2014

To: Members of the Board of Education

From: Jim Owens, Senior Director, Office of School Modernization

Subject: Bond Program Status – November 2014

In the November 2012 election, the voters approved a \$482M capital improvement bond for Portland Public Schools. The District's Office of School Modernization Staff has developed a set of performance measures to provide management information for the staff and reporting tools for the Bond Accountability Committee and the Board's oversight role. Performance metrics for the 2012 bond program are based on the Balanced Scorecard (BSC).

Attached is the BSC for the month of November 2014. Staff will present the status of the program. Following the presentation, the Board is welcome to ask any questions relating to that topic as well.

Attachment 1: Balanced Scorecard Report – November 2014
Attachment 2: Project Management Cost Report – November 2014

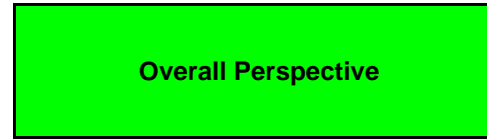
Project Management Cost Report

Project Cost Summary Report for 2012 Capital Improvement Bond Program						
Capital Program Start Date: Nov 2012			Report Run Date: 10.01.2014			
Capital Program End Date: Nov 2020						
Project Name	Original Project Budget	Project Budget Changes	Current Budget	Project Estimate At Completion	Forecasted Over/(Under)	Invoices Approved
Franklin HS Modernization	81,585,655	22,877,103	104,462,758	94,018,732	(10,444,026)	2,463,236
Grant HS Modernization	88,336,829	5,188,081	93,524,910	84,184,593	(9,340,317)	4,813
Roosevelt HS Modernization	68,418,695	23,778,586	92,197,281	82,977,281	(9,220,000)	1,820,934
Faubion Replacement	27,035,537	2,179,669	29,215,206	29,032,177	(183,029)	1,176,973
Improvement Project 2013	9,467,471	2,595,366	12,062,837	11,969,300	(93,537)	11,962,359
Improvement Project 2014	13,620,121	5,586,678	19,206,799	18,072,701	(1,134,098)	11,552,582
Improvement Project 2015	13,521,066	(983,607)	12,537,459	10,920,332	(1,617,127)	211,971
Improvement Project 2015 - SCI	0	2,581,763	2,581,763	2,228,434	(353,329)	0
Improvement Project 2016	15,274,437	(2,955,183)	12,319,254	10,471,366	(1,847,888)	0
Improvement Project 2017	6,796,707	3,395,649	10,192,356	8,663,503	(1,528,853)	0
Improvement Project 2018	9,062,119	(8,533,237)	528,882	449,550	(79,332)	0
Improvement Project 2019	0	663,638	663,638	564,092	(99,546)	0
Master Planning - Benson HS	191,667	(30,000)	161,667	161,667	0	0
Master Planning - Cleveland HS	191,667	(30,000)	161,667	161,667	0	0
Master Planning - Jefferson HS	191,667	(30,000)	161,667	161,667	0	0
Master Planning - Lincoln HS	191,667	(30,000)	161,667	161,667	0	0
Master Planning - Madison HS	191,667	(30,000)	161,667	161,667	0	0
Master Planning - Wilson HS	191,667	(30,000)	161,667	161,667	0	0
Marshall Swing Site - Bond 2012	0	4,000,000	4,000,000	3,600,000	(400,000)	1,123,993
Swing Sites & Transportation	9,550,000	(4,656,000)	4,894,000	4,894,000	0	0
Educational Specification	0	300,000	300,000	287,733	(12,267)	270,784
Debt Repayment	45,000,000	0	45,000,000	45,000,000	0	45,000,000
2012 Bond Program	93,181,361	(30,613,661)	62,567,700	38,597,852	(23,969,848)	7,352,736
	482,000,000	25,224,844	507,224,844	446,901,649	(60,323,196)	82,940,381

Narrative Comments:

1. IP2014 continues with closeout activities and work on the new elevators. IP2015 is in design; schematic design drawings to be completed this month.
2. Franklin is currently in review of the 100% design development documents. Land use is underway, with a hearing anticipated for next month.
3. Roosevelt continues in the design development phase. Staff is coordinating with the City of Portland to align a permitting and phasing plan to support construction of the occupied site.
4. The Faubion has restarted (as planned) schematic design phase activities.

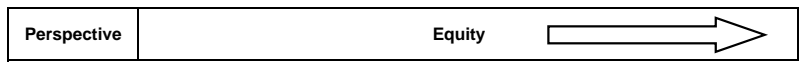
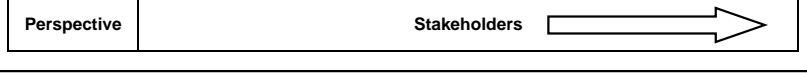
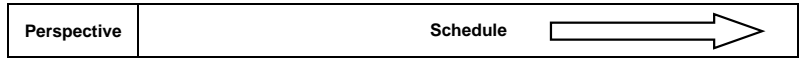
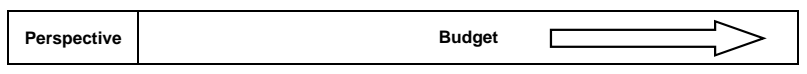
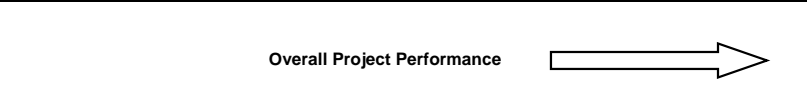
Color Key	
	Good
	Concerns
	Difficulty



Perspective	Perform
Budget	
Schedule	
Stakeholders	
Equity	
Average	

2012 Bond Projects

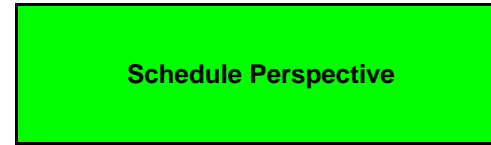
Improvements 2013	Roosevelt HS	Faubion K8	Improvements 2014	Franklin HS	Improvements 2015	Improvements 2015-SCI	Grant HS	Marshall Campus			Program Contingency	Program Mgmt



Narrative Comments:

- Franklin has completed the design development phase and internal stakeholder reviews and has moved into construction documents development.
- Roosevelt has developed a recovery schedule to keep the planned completion date of fall 2017. However, expect considerable site work to continue well into Nov 2017. Work won't interfere with teaching & learning activities.
- IP2015 and IP2015-SCI projects are proceeding with design; anticipate bidding work in spring 2015.

Color Key	
	Good
	Concerns
	Difficulty



Strategic Obj.	Perform
A	
B	
C	
D	
Average	

Strategic Objectives	Performance Measures	Performance Targets
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2012 Bond Projects

Improvements 2013	Roosevelt HS	Faubion K8	Improvements 2014	Franklin HS	Improvements 2015	Improvements 2015-SCI	Grant HS	Marshall Campus				
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Objective A Establish Schedule Target & Strategy		
1	Occupancy Date Goal Established	
2	Project Execution Strategy Developed	
3	Overall Project Schedule Established	

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Objective B Planning, Permitting & Design Phases on Schedule		
4	Design Contract Award	Green = < 0 weeks impact on scheduled design completion date. Yellow = 0 - 4 weeks Red > 4 weeks
5	Schematic Design Completed	
6	Design Development Completed	
7	Land Use Permit Approved	
9	Building Permit Approved	

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Objective C Construction on Schedule		
10	Prime Contract Notice to Proceed	Green = < 0 weeks impact on scheduled construction completion date. Yellow = 0 - 4 weeks; Red > 4 weeks
11	Construction Started	
12	Substantial Completion Date	

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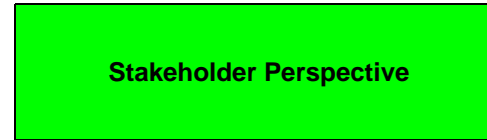
Objective D Meet Occupancy / Completion Schedule Target		
13	FF&E Ordered	Same as Objective C
14	FF&E Delivered and Installed	
15	Projected Occupancy Date	Green = < 0 weeks impact on scheduled date. Yellow = 0 - 4 weeks; Red > 4 weeks

09/13	09/17	09/17	09/14	09/17	09/15	09/15	09/19	12/14				

Narrative Comments:

1. Feedback has been requested from maintenance and principals on the IP2014 work. Expecting responses soon. Data will be updated in November.

Color Key	
	Good
	Concerns
	Difficulty



Strategic Obj.	Perform
A	
B	
C	
Average	

2012 Bond Projects

Improvements 2013	Roosevelt HS	Faubion K8	Improvements 2014	Franklin HS	Improvements 2015	Improvements 2015-SCI	Grant HS	Marshall Campus				
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Strategic Objectives	Performance Measures	Performance Targets
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Objective A Meets Educational Needs	Item	Rating
	1 Project Scope Meets Educational Needs	Green: Rating of ≥ 4.0 (1 - 5 scale)
	2 Design Meets Educational Needs	Yellow: 3.0 - 4.0
	3 Construction Meets Educational Needs	Red: < 3.0

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Objective B Meets Maintenance / Facility Needs	Item	Rating
	4 Project Scope Meets Maint. / Facility Needs	Green: Rating of ≥ 4.0 (1 - 5 scale)
	5 Design Meets Maint. / Facility Needs	Yellow: 3.0 - 4.0
	6 Construction Meets Maint. / Facility Needs	Red: < 3.0

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Objective C Design Advisory Group (DAG) Needs	Item	Rating
	7 Master Planning: Scope Meets DAG Needs	Green: Rating of ≥ 4.0 (1 - 5 scale)
	8 Design Meets DAG Needs	Yellow: 3.0 - 4.0;
	9 Construction Meets DAG Needs	Red: < 3.0

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Narrative Comments:

1. Program budget revisions to reflect expected revenue from Concordia University (CU) are planned for next month. Planning for the Faubion replacement project anticipates \$15M from CU for their college of education and other Faubion wrap-around support services.

2. IP2014 continues with closeout activities on all sites without continued elevator work. Contract change order percentages are coming in very favorably; less than 5% for the project to date.

Color Key	
	Good
	Concerns
	Difficulty



Strategic Obj.	Perform
A	
B	
C	
D	
Average	

2012 Bond Projects

Improvements 2013	Roosevelt HS	Faubion K8	Improvements 2014	Franklin HS	Improvements 2015	Improvements 2015-SCI	Grant HS	Marshall Campus			Program Contingency	Program Mgmt
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Strategic Objectives	Performance Measures	Performance Targets
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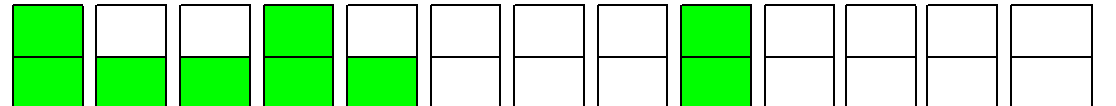
Objective A Project Budget and Scope Aligned	1	Initial Cost Estimate of Approved Scope	≥ 10% Contingency Available
	2	Master Plan	Within Budgeted Amount



Objective B Planning & Design Costs within Budget	3	Projected Total P & D Costs	Within Budgeted Amount
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Objective C Construction Costs within Budget	4	Construction Cost Award Price or GMP	Within Budgeted Amount
	5	Construction Cost Current Estimate thru 50% complete	>5% project level contingency



Objective D Project within Budget	6	Total Project Costs Within Budgeted Amount	Within Budgeted Amount
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Narrative Comments:

1. Current MWESB payments declined to under 10%. OSM has expended over \$2.8M to state certified MWESB firms.
2. The Marshall Campus project and IP2014 project have participated in the City of Portland's Workforce Hiring and Training Program. Both projects are exceeding the 20% apprenticeship goal with 49% and 32% of applicable hours worked by apprentices, respectively.

Color Key	
	Good
	Concerns
	Difficulty

Equity Perspective

Strategic Obj.	Perform
A	
B	
C	
Average	

2012 Bond Projects

Improvements 2013	Roosevelt HS	Faubion K8	Improvements 2014	Franklin HS	Improvements 2015	Improvements 2015-SCI	Grant HS	Marshall Campus				Program Mgmt
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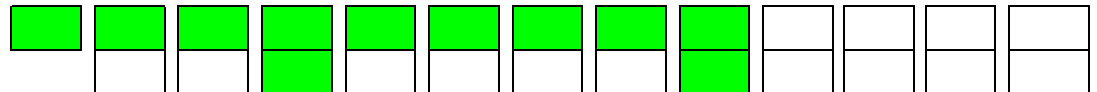


Strategic Objectives	Performance Measures	Performance Targets
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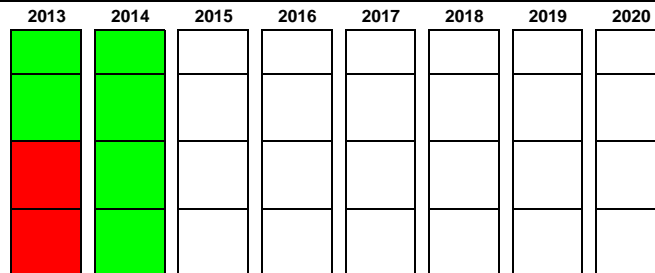
Objective A Meets Aspirational MWESB	1	Project objectives established	Green: MWESB >18% Yellow: MWESB >10% Red: MWESB <10%
	2	Consultants - % of payments made to MWESB owned	
	3	Contractors - % of payments made to MWESB owned	



Objective B apprenticable trade participation	4	Project objectives established >\$200k contracts	Green: participation >20% Yellow: participation >10% Red: participation <10%
	5	Contractors % of labor hours/apprenticable trade	



Objective C Meets student participation	6	Project objectives established >\$100k contracts	Per AD Green: students > 500 Yellow: students > 100 Red: students < 100 Green: students > 50 Yellow: students > 20 Red: students < 20 Green: students > 10 Yellow: students > 5 Red: students < 5
	7	Tier 1 - Group Activities EG: career fairs, guest speakers	
	8	Tier 2 - 1-on-1, Short-Term Activities EG: job shadows, mock interviews	
	9	Tier 3 - 1-on-1, Long-Term Activities EG: internships	





Board of Education

Superintendent's Recommendation to the Board

Board Meeting Date: Nov. 10, 2014

Executive Committee Lead: Jollee Patterson

Department: General Counsel

Presenter/Staff Lead: Jollee Patterson

Agenda Action: Resolution Policy

SUBJECT: Revision of Complaint Policy, 4.50.030-P; Revocation of Citizen Complaint Policy 7.20.030-P

BRIEF SUMMARY AND RECOMMENDATION

The Superintendent and staff recommend the Board adopt the revised Complaint Policy, 4.50.030, and revoke the outdated citizen Complaint Policy, 7.20.030. The revised policy, which will be implemented according to the new administrative directive, will provide a more accessible and transparent complaint resolution process that will also be in accordance with state law. The draft policy and AD have been reviewed multiple times by the Board and stakeholders have provided valuable feedback as well.

BACKGROUND

The Student/Parent Complaint Policy has been in need of revision in order to make the process more accessible and clear to our diverse students, families and community members. As part of the Corrective Action Plan with the Oregon Department of Education, the District agreed to update the policy to bring it into compliance with state law and regulations.

RELATED POLICIES / BOARD GOALS AND PRIORITIES

The Superintendent recommends that the Board revise the current Student/Parent Complaint Policy 4.50.030 and revoke the Citizen Complaint Policy 7.20.030 so there is one policy that students, families and members of the community can use. In addition, staff has drafted an administrative directive that contains the detailed guidance on how the policy will be implemented.

PROCESS / COMMUNITY ENGAGEMENT

The draft policy and AD have been provided to a diverse group of stakeholders. Staff received extensive public response to the drafts, and incorporated feedback from the public. The draft policy was posted for 28 days on the website. In addition, the Board held a work session on the draft policy and AD, and engaged in extensive discussion at the session. The Board also

**Reviewed and Approved by
Superintendent**

Handwritten signature of Carrie Smith in cursive script.

provided feedback during the first reading of the policy. This feedback was used to revise the administrative directive.

ALIGNMENT WITH EQUITY POLICY IMPLEMENTATION PLAN

The revised policy reflects the goal of the Board's Racial Education Equity Policy, 2.10.010, to "welcome and empower students and families, including underrepresented families of color (including those whose first language may not be English) as essential partners in their student's education, school planning and District decision-making." The policy provides that the Ombudsman will be available to assist families with the complaint process and finding resolutions. Interpretation and translation services will be provided to any complainants requesting such assistance. In addition, once the Board approves the policy, materials will be developed that are user-friendly and accessible to the public.

BUDGET / RESOURCE IMPLICATIONS

The District has hired an Ombudsman who will be available to assist students, families, community members and staff through the complaint process and finding resolutions. The District will be using an Auditor for the complaint process as part of the Corrective Action Plan with the Oregon Department of Education.

NEXT STEPS / TIMELINE / COMMUNICATION PLAN

If the Board adopts the policy, the Ombudsman will develop a plan for training staff and ensuring information about the process is available to students, families and the public. Following Board adoption, the policy will be submitted to ODE.

The resolution adopting the policy will provide that the Board will receive a report on the implementation of the policy within a year.

ATTACHMENTS

- A. Revised Complaint Policy 4.50.030
- B. Administrative Directive implementing Complaint Policy
- C. Redline showing changes to AD following Board discussion at First Reading
- D. Former Student/Parent Complaint Policy 4.50.030
- E. Citizen Complaint Policy 7.20.030 (to be revoked)

Reviewed and Approved by Superintendent
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BOARD POLICY

Complaint Policy

4.50.030-P

Portland Public Schools recognizes students, parents/guardians and people who reside in the district as essential partners in the educational process. These important partners must have the opportunity to make their concerns known to the district. Maintaining strong relationships includes having a fair, accessible process in which complaints can be addressed in a timely manner.

Whenever possible, concerns should be resolved by communication with the school or department directly involved in the issue. If the concern is not resolved through communication with the parties directly involved, the District provides a complaint process. This process shall include the opportunity for students, parents/guardians and people who reside in the district to appeal up to the Superintendent, and if appropriate, the Board. In general, the Board is responsible for policy-level issues, while the Superintendent is charged with the management and operations of the District. The complaint resolution process must include the opportunity for the parties involved to explain their experience and viewpoint of the matter so that multiple perspectives are considered. It is the intent of the Board that complaints be resolved as expeditiously as possible.

The District serves a diverse community of students and parents/guardians. The Racial Educational Equity Policy 2.10.010-P provides: “The District shall welcome and empower students and families, including underrepresented families of color (including those whose first language may not be English) as essential partners in their student’s education, school planning and District decision-making. The District shall create welcoming environments that reflect and support the racial and ethnic diversity of the student population and community.” The complaint process must be implemented in a manner that is accessible to, and welcoming of, all of our students, parents/guardians and community members. All parties to the complaint process will be treated, and will treat others, with dignity and respect.

The district has an Ombudsman whose role is to assist in dispute resolution, and to help ensure that the complaint process is accessible to the public. The Ombudsman also makes recommendations directly with the Superintendent regarding areas of improvement for the district.

School board members who receive complaints shall direct the complainant to contact the appropriate school or department in order to address the complaint. Complainants



BOARD POLICY
Complaint Policy

4.50.030-P

can also be referred to the Ombudsman for assistance with the process. Complaints regarding specific employees will be referred to the Chief Human Resources Officer for resolution through the appropriate personnel process.

No District employee, student or Board member may engage in retaliation against any person who files a complaint or participates in the complaint process. Any employee or student who engages in any form of retaliation for filing a complaint, or for participation in an investigation, will be subject to disciplinary action up to and including dismissal.

As provided by state law, students, parents/guardians and people who reside within the district may appeal to the State Superintendent of Public Instruction under OAR 581-022-1940 relating to certain violations of Oregon Administrative Rule and Oregon law.

The Board directs the Superintendent to implement an administrative directive that sets forth the specific process and procedure for complaint resolution. The Board further directs the Superintendent to provide information regarding the complaint process to members of the school community in a manner that is accessible and user-friendly, and to provide training for school staff in the implementation of the policy and administrative directive.

Complaint Resolution Process – X.XXX.XXX – AD

In accordance with Board Policy 4.50.030-P, this administrative directive sets forth the specific procedure for resolution of complaints by students, parents/guardians and people who reside in the district (“complainant”). As directed by the Board of Education in that policy, the District is committed to resolving complaints in a fair and timely manner through a process in which all parties, including families of color and other underrepresented communities, will have an opportunity to present their perspective and be treated with respect and dignity.

The District is committed to making the complaint process accessible for our diverse population. Translation and interpretations services will be made available to complainants.

The District has an independent Ombudsman, whose job is to help families, community members, schools and the district resolve issues satisfactorily. The Ombudsman is available to assist all parties through the problem-solving process and the complaint resolution process.

The district encourages parties to meet to reach resolution at the school or department level whenever possible. The complaint process starts when the complaint is submitted in writing by letter, email, or by using the district complaint form as defined in Step 1, below.

SCHOOL/DEPARTMENT-BASED PROBLEM SOLVING

In classrooms, schools and departments, our staff, parents and students work together frequently to problem solve issues and improve our processes with the goal of creating the best possible educational experience for students. This type of collaboration is the best way to resolve concerns. While not part of the formal complaint process, the following procedure applies to this type of problem-solving work.

- A. If the concern is related to a classroom/school:
 1. The complainant is encouraged to first speak to the teacher or staff person involved.
 2. If the concern is not resolved through direct communication, the complainant is encouraged to speak with the principal of the school. Principals have 10 calendar days to respond to concerns, which may include an in-person conference if requested by any involved party. If the concern is not resolved to the complainant’s satisfaction, the principal shall inform the complainant of the complaint process.

- B. If the concern is related to a district department:
 - 1. The complainant is encouraged to first speak to the staff person involved.
 - 2. If the concern is not resolved through direct communication, the complainant is encouraged to speak with the staff person's supervisor. Supervisors have 10 calendar days to respond to concerns, which may include an in-person conference if requested by any involved party. If a complainant is not sure who the appropriate supervisor is, the complainant may contact the Ombudsman for assistance. If the concern is not resolved to the complainant's satisfaction, the supervisor shall inform the complainant of the complaint process.

COMPLAINT PROCESS

If complainants are not able to resolve the concern at the school or departmental level, they may file a formal written complaint. The receipt of the written complaint starts the 90 day completion timeline for the purposes of state law. The complaint process concludes with the issuance of a written decision by the Superintendent at Step 2. As further outlined below, the complainant at that point can either accept the Superintendent's decision, request an appeal to the Board or appeal to the Oregon Department of Education.

Step1:

- A. The written complaint must be filed with the Ombudsman or the Office of the Superintendent via letter, email or the written complaint form. The written complaint should include the name and contact information for the complainant, a description of the concern, and the student's name, if applicable. In order to facilitate the resolution process, it would be helpful if the written complaint also included the names of any other parties involved, including witnesses, a description of efforts to resolve the concern, and suggestions for resolution. The Ombudsman will ensure that resources are provided for complainants who request assistance in preparing a written complaint. The Ombudsman shall provide a written acknowledgement of receipt of the complaint within 5 days of receiving the written complaint.
- B. The goal at Step 1 is to reach a mutually-agreed upon resolution of the complaint. Upon receipt of the written complaint, the Ombudsman or his/her designee shall review the written complaint and gather additional information from involved parties in order to understand multiple perspectives regarding the concern. After gathering information, the Ombudsman will share information with all involved parties to identify possible solutions. In certain situations, the Ombudsman may set up a meeting to discuss options and work

- toward an acceptable outcome for all parties. The Ombudsman makes recommendations but does not make final decisions regarding complaints.
- C. If the parties cannot reach a mutually acceptable resolution, the Senior Director of Schools for the involved school, or the appropriate department supervisor, will have the responsibility for issuing a decision at Step 1. This supervisor or designee will also be responsible for investigation of the concern and will be involved in the discussions regarding possible mutually acceptable solutions. The Superintendent may assign a different decision maker at Step 1 as appropriate.
 - D. When applicable, the Ombudsman will consult with district legal counsel regarding pertinent district policy, and relevant state and federal laws.
 - E. All formal complaints will receive a resolution in writing within 30 days of receipt of the complaint. The resolution will include information about the next steps in the complaint process.

Step 2:

If the issue is not resolved to the complainant's satisfaction, the complainant may request a review in writing by the Office of the Superintendent. The Step 2 review will include the written complaint from Step 1, the written resolution from Step 1, any available documentation from the Step 1 process, and the request for Level 2 review.

- A. The request for review shall be submitted in writing within 10 days of the complainant receiving notice of resolution from Step 1.
- B. The Superintendent or designee will review the record, and may choose to meet with involved parties.
- C. If significant new evidence is introduced at Step 2, the complainant will be referred back to Step 1 so as to ensure there is an opportunity for meaningful dispute resolution and investigation that includes the new evidence. "Significant, new evidence" is evidence that could have changed the outcome or investigation at Step 1.
- D. If a new, additional concern is raised at Step 2, the new concern will be referred back to Step 1. The concerns that were already addressed at Step 1 will continue to proceed through the appeal process.
- E. Following the review, the Superintendent shall decide that:
 - 1. No substantial evidence exists and no further action will be taken; or
 - 2. Specific remedial action will be taken.
- F. The Superintendent or designee shall provide copies of the written decision to the complainant. The written decision shall include findings of fact, conclusions of law and the legal basis for the decision as required by OAR 581-022-1941. The Oregon Department of Education has explained that "legal basis" and "conclusions of law"

mean applying the statute, Oregon Administrative Rule or district policy applicable to the facts. All complaints appealed to the Superintendent will receive a resolution in writing within 30 days of receipt of the request for review. The superintendent or designee will include information on the next steps in the complaint process.

- G. The decision of the Superintendent is the final decision. Upon receiving the Superintendent's decision, if the complainant wants to continue to appeal, the complainant may choose to either request an appeal to the Board or appeal directly to the Oregon Department of Education.

Step 3:

If the complainant is not satisfied with the final decision of the Superintendent, the complainant may request an appeal in writing to the Board of Education. The appeal will include the concerns and information included in the original written complaint. Any new concerns or substantive information not previously submitted will be referred back to Step 1.

- A. The request for a Board level appeal shall be submitted to the Board Office within 20 days of the Superintendent's decision. The Board will vote on whether to consider the appeal within 20 days following the receipt of the request for appeal. The Board will be provided with the written record of appeal, including documents submitted at Steps 1 and 2, and the decision of the Superintendent.
- B. The Ombudsman will inform the complainant within two days after the Board vote as to whether the Board decided to consider the appeal.
- C. If the Board votes to consider the appeal, the Board will vote on the substance of the appeal within 30 days of the Board's decision to consider the appeal. The Board will have the full written record of the appeal. The complainant may submit additional written information to the Board, and may provide testimony during public comment.
- D. If the Board does not consider the appeal, the complainant may still choose to appeal to the Oregon Department of Education. If the Board consider the appeal, but does not vote to overturn the Superintendent's decision, the complainant can appeal to the Oregon Department of Education.

Additional provisions:

- 1) Complainants may file formal complaints on their own behalf, or on behalf of their enrolled student, or about district policies or practices. Complainants cannot file complaints on behalf of another person or student. This does not restrict the ability of complainants to bring an advocate to any meeting or proceeding.

- 2) The goal of the complaint process is to bring timely resolution to issues of concern to complainants. Complaints become more difficult to investigate and resolve if they are not brought forward promptly. At the same time, the District recognizes that there can be legitimate reasons for delay in filing complaints. In order to both promote timely resolution of complaints and ensure the complaint process remains accessible, complaints must be brought within one year of the incident leading to the complaint, or within one year of the complainant learning of the incident leading to the complaint, whichever is later. This one-year limitation does not bar the consideration of relevant evidence that is older than one year.
- 3) In some cases, District policies or administrative directive provide a specific complaint resolution and/or appeal process. For instance, the Administrative Directive regarding Student Transfers 4.10.054-AD establishes the process by which student transfer decisions may be appealed. In such instances, the specific procedure shall apply rather than the general complaint procedure.
- 4) If, during the course of the complaint process, concerns are raised that a specific employee has engaged in misconduct, the Ombudsman will ensure that those complaints are referred to the Chief Human Resources Officer for resolution through the appropriate personnel process. These personnel processes will include provisions in collective bargaining agreements if applicable to the employee. Allegations of employee misconduct are taken seriously and will be investigated.
- 5) If a complainant does not feel safe addressing a concern directly with an employee, such in cases of harassment, the complainant may go directly to that employee's supervisor or contact the Chief Human Resources Officer. The Ombudsman is also available to assist.
- 6) No District employee, student or Board member may engage in retaliation against any person who files or participates in the complaint process. Any employee or student who engages in any form of retaliation against a person(s) for filing a complaint and/or for participation in an investigation or inquiry will be subject to disciplinary action. As defined in 4.30.061-AD Anti-Harassment, "retaliation" is generally understood to mean: "experiencing an adverse impact after making or supporting a claim of harassment if the impact would deter a reasonable person from making such a claim."
- 7) The timelines set forth above may be extended by the mutual consent of the complainant and the district. In particular, if complainants seek to submit appeals after the time periods set forth in the process, the district may choose to accept those appeals if the complainants agrees to extend the overall time period for resolution for the same number of days as the extension granted to the complainant. If complaints are submitted during a school break, such as Winter Break or summer, during which relevant staff and witnesses may not be available, the District will

work with the complainant on the timeline. In all cases, the district will seek to resolve complaints as expeditiously as possible.

8) As used in this administrative directive, “days” will be counted as “calendar days.”

9) The Ombudsman is available to answer questions and concerns about the process. The Ombudsman will be responsible for providing information and training to staff on the implementation of the complaint process.

Further appeal

Oregon state law (OAR 581-022-1940) allows complainants to appeal a final decision by a school district to the State Superintendent of Public Instruction if the complaint alleges (1) a violation of the standards of the Oregon Administrative Rules, chapter 581, Division 22, or (2) a violation of other statutory or administrative requirements for which the State Superintendent has appeal responsibilities. Complainants will receive written notice of this right when the decision of the school district is final.

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Board of Education Informational Report

MEMORANDUM

Date: May 28, 2014

To: Members of the Board of Education

From: Judy Brennan, Enrollment Director
Jon Isaacs, Chief of Communications and Public Affairs

Subject: Superintendent's Advisory Committee on Enrollment and Transfer Recommendations

In March, 2013 the superintendent charged the Superintendent's Advisory Committee on Enrollment and Transfer (SACET) with developing recommendations to align enrollment and transfer policies with the district's strategic framework and racial educational equity policy. The committee delivered the attached recommendations to Superintendent Smith this week.

We are pleased to share this report with you, and are very grateful for the committee's commitment to improving equity across all schools. We also appreciate SACET's Board liaisons, Ruth Adkins and Bobbie Regan, who have regularly attended committee meetings and shared important perspectives with the group.

The attached report finalizes work that was described in an initial report in June 2014. SACET is scheduled to present a summary of the report to you on November 10, 2014. The superintendent will respond soon after with a timeline for making policy-change recommendations to you for decision.

Please contact us with any questions.

SACET Recommendations to Align the Enrollment & Transfer System and the Racial Educational Equity Policy for Portland Public Schools

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EXECUTIVE SUMMARY

The Superintendent formed the Superintendent's Advisory Committee on Enrollment and Transfer (SACET) in 2008 to guide her as she seeks to improve equity, program access and educational achievement for all students.

The 12 men and women on the standing committee live in neighborhoods across the district and represent a diverse sample of the city's racial composition, including people who are African American, South Asian, Pacific Islander, West Indian, Middle Eastern, Latina, Caribbean, White and Multiracial. SACET includes PPS alumni, parents, educators and community members.

In March 2013, Superintendent Carole Smith issued the following charge to SACET:

1. Recommend revisions to enrollment and transfer policies to improve alignment with Portland Public Schools' strategic framework and Racial Educational Equity Policy.
2. Participate in a district-wide school boundary review process. This ongoing process is a joint project of Portland Public Schools and the Portland State University Center for Public Service.

Because SACET provided feedback on high school transfer issues in 2009, we focused this review on K-8 programs and schools. In keeping with the Superintendent's charge we focused on transfers covered by policy 4.10.051 and focus options as described in policy 6.10.022.

Awareness of the racial educational achievement gap permeated our work. This gap is evidenced by the statistics shaping the Superintendent's top three academic priorities:

- A. Boosting early literacy: Just 61.3 percent of the district's historically underserved students meet the third-grade reading benchmark compared to 75.3 percent of all district third-graders.
- B. Reducing exclusionary discipline rates: African-American students are four times more likely to be expelled or suspended than White students.
- C. Graduating more students on time: The district's four-year graduation rate stands at 59 percent for historically underserved students and 67 percent for the district.

In recognition of the pervasive achievement and opportunity gaps, we have applied the Racial Equity Lens throughout our discussions. We studied policies, programs, practices and decisions and asked if they ignored or worsened existing disparities, destabilized the system as a whole, or produced other unintended consequences. It is

clear that enrollment and transfer policies and practices have differing repercussions depending on racial group.

In June 2014, SACET issued a report that provided extensive analysis of the historical context and current state of the enrollment and transfer system. We outlined preliminary recommendations, and described additional actions necessary to complete our charge, including data simulations and additional outreach. This report presents final recommendations that have been informed by that work, and is meant as a supplement to, not a replacement of, SACET's earlier work. This report builds on those findings, incorporating what we learned over the last five months and sharpening our recommendations in ways that we think will rectify inequities for historically underserved students.

SACET's process

We have met over 40 times in the last 18 months. We held panels with neighborhood and focus option school principals, and we heard from the district's dual-language immersion and special education departments. We also held several meetings with the district-wide boundary review team from the PSU Center for Public Service.

We spent the summer revisiting our preliminary recommendations, conducting data modeling, and listening to additional families whom the district has often neglected to include in its decisions. We found it crucial to engage groups that have historically been disenfranchised in Portland Public Schools' policy making. Over the past year, we've held listening sessions with African-American, Latino, Native American, Asian and Pacific Islander families, as well as families of students in special education. SACET is grateful to the Asian Pacific American Network of Oregon (APANO), Self Enhancement Inc (SEI), Portland African American Leadership Forum (PAALF), Native American Youth and Family Center (NAYA), and Latino Network for the planning, outreach and facilitation of the listening sessions, which drew in total approximately 70 parents, students and community members. While we recognize that is a limited sample, participants' perspectives were important to gather and might not have been heard in more typical settings.

Destabilized schools, program inequities, exacerbated segregation

As reported in our preliminary recommendations, we find that the district's enrollment and transfer system has, over time, destabilized the school system; helped create

inequities in educational programs at the K-5, K-8 and middle school levels; and exacerbated patterns of segregation by race and class. Further, we have identified barriers in the lottery system that perpetuate socioeconomic disparities and that conflict with the Racial Educational Equity Policy by perpetuating racial disparities.

Our recommendations seek to address these findings and, in keeping with the Racial Educational Equity Policy, to foster “welcoming environments that reflect and support the racial and ethnic diversity of the student population and community,” and improve access to “high-quality and culturally relevant instruction, curriculum, support, facilities and other educational resources.” In an increasingly diverse district, SACET realizes that this is an imperative at all schools.

Overview of recommendations

All of our recommendations are grounded in our core belief that neighborhood schools should be the foundation of the Portland Public School system and that district leaders must forge strong, accessible schools in every neighborhood.

We recommend:

1. Ending neighborhood-to-neighborhood lottery transfers.
2. Strengthening the petition transfer process.
3. Implementing a quality review process for focus option schools.
4. Continuing the district’s support for dual-language immersion programs.
5. Modifying the focus option lottery system.
6. Providing greater enrollment stability for children receiving special education services.

We have tried to accommodate members’ diverse views in our deliberations. This report and our recommendations reflect consensus but not unanimity. The degree of member support is noted for each recommendation.

Just as the current system has had many unintended consequences, every recommendation carries with it the possibility of unintended consequences. We have weighed those to the best of our ability. We strongly recommend that SACET or another body regularly monitors the implementation of these recommendations to identify and address inequities before they become entrenched.

This report is supported by 12 of 12 committee members.

CORE BELIEF: NEIGHBORHOOD SCHOOLS ARE THE HEART OF A COMMUNITY

Our committee holds a number of guiding beliefs (see appendix). But we want to call attention to our most fundamental belief: All students should have access to a high-quality and appropriate education close to their home. The same belief is also laid out in the Educational Options Policy, which states: “The Board is committed to providing a quality school near every student’s home and an appropriate learning environment for all students, including those with special needs, within their home cluster.”

However, the evidence listed on Page 1 of this report makes it clear that not all students are benefitting from such programs now. Furthermore, one out of every three PPS students attends a school outside their neighborhood, and 10 percent of the district’s students seek new transfers through the lottery each year, pulling them farther from home, not closer to it.

We are aware that families can choose schools, including private and charter options, in many ways. Some can buy or rent a house – or fraudulently claim the address of a friend or family member – near the school they desire. Others will go through the processes established by the district. We heard at a NAYA listening session this summer a sentiment that echoed across all listening sessions about all kinds of school choices: “When a community hears about a supportive school, families try to get their kids in there.” This was especially important for families of color who have not been well served by the district.

Still, we want the district to design a system where the color of a student’s skin does not predict success, as it currently does. The system should ensure student success, regardless of how they learn, where they live, what language they speak or their economic status. We call on the district to ensure every school has adequate resources to provide an enriched curriculum, high quality, culturally competent teachers and principals, and fully inclusive classrooms for students with disabilities and exceptional needs.

The system we desire will give families fewer reasons to leave their neighborhood schools. Culturally responsive and authentic outreach is also necessary to draw community members into long-term, positive relationships with their neighborhood schools.

We understand that the district has been through a period of enormous change in recent years in response to an 18 percent, 12-year enrollment slide and diminished revenues. Over 16 years, 20 schools closed. Grade structures changed at 32 schools;

boundaries shifted between 44 schools; choice programs were added or significantly reduced or expanded at 23 schools.

Today, enrollment is growing and funding has stabilized. PSU forecasts enrollment will push past 50,000 students by 2025. Today, some schools have too many students, and others, not enough. Some factors, such as a lack of affordable housing, will always be out of the district's control. But we believe the district has an obligation to use mechanisms it does control, such as school boundaries and transfer options, to design a more equitable educational system for all students. SACET urges the Superintendent to use the upcoming district-wide boundary review process, along with the recommendations included in this report, as a catalyst for cultivating the kind of schools that will earn back the trust of all families, especially those who have been historically underserved.

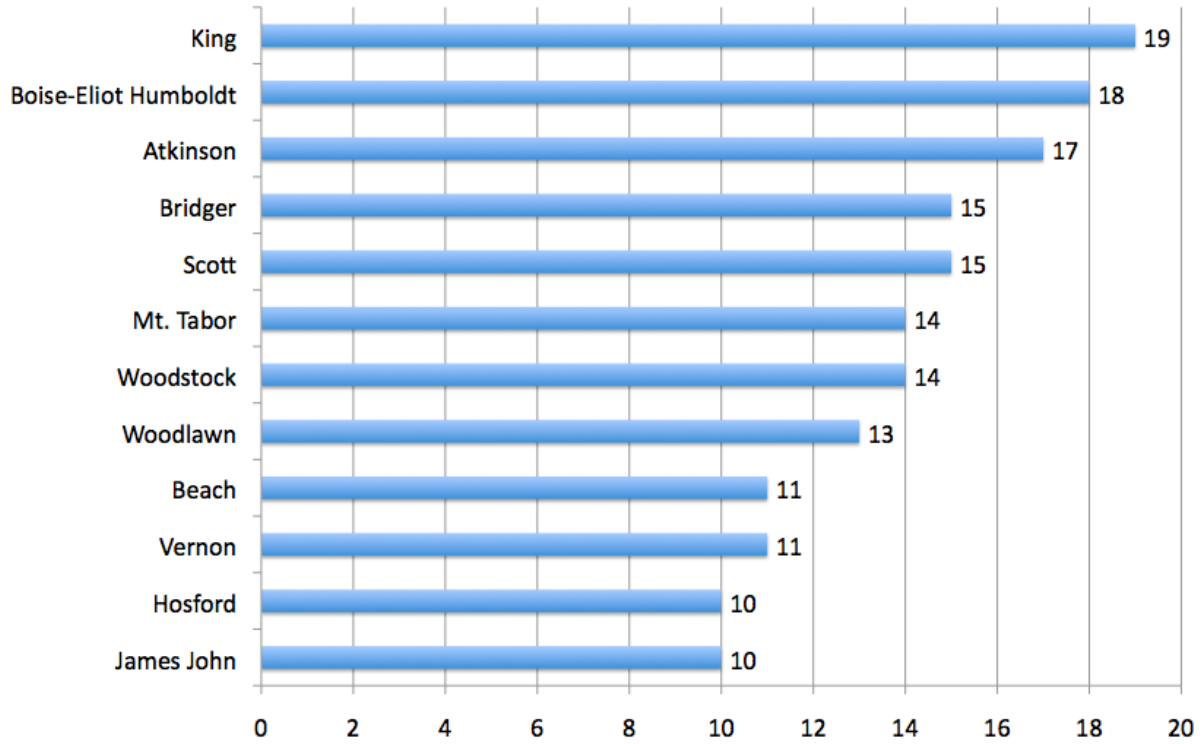
RECENT FINDINGS

Information we gathered since our preliminary report confirms: program offerings are largely determined by enrollment numbers, which are in turn a product of neighborhood size and transfers. While it's true that most families send their children to neighborhood schools, at some schools, the volume of students transferring out has a visible negative impact on programs. What's more, the schools with high transfer rates out tend to be the ones that serve the most students of color as well as the most economically disadvantaged students.

Relationship between school demographics and enrollment and transfer system

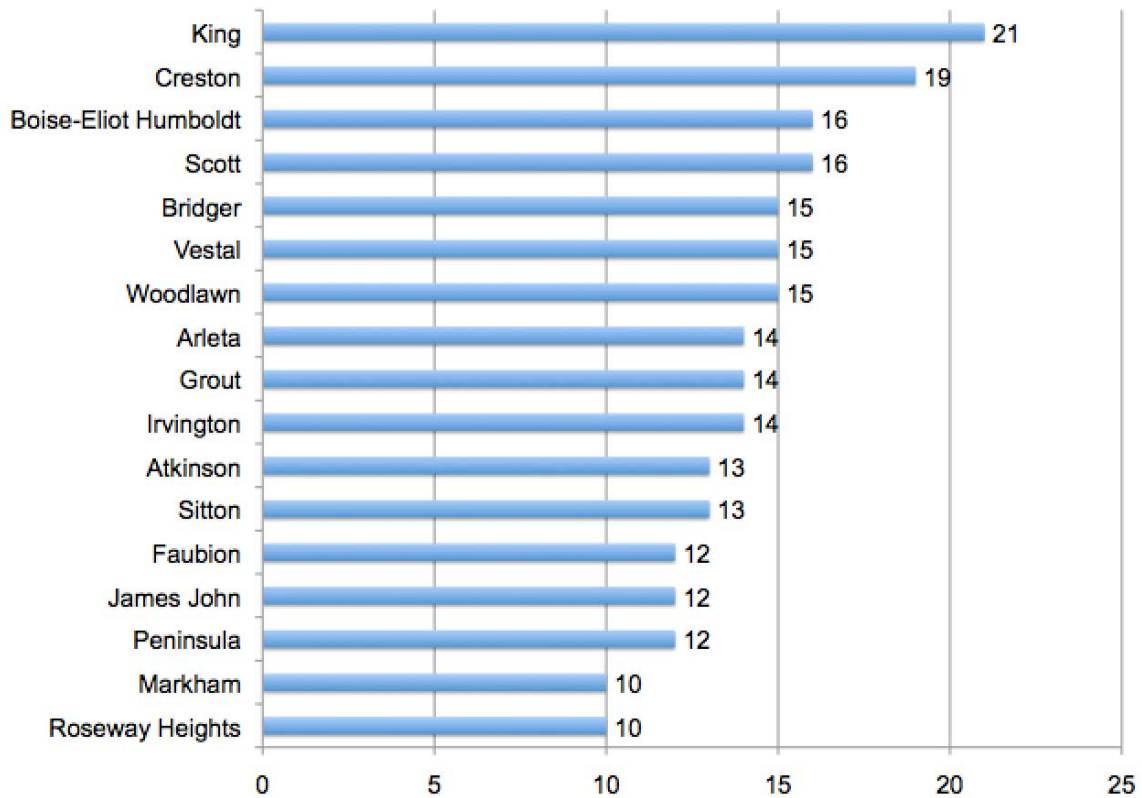
SACET found that the demographic makeup of the student body in most schools is reasonably consistent with that of its neighborhood. But in a subset of schools, we see a substantial difference between the school and neighborhood along lines of race, poverty, and sometimes, both. For example, King K-8 School in Northeast Portland has a student body demographic that has 19 percent more students of color than the demographic of students who reside in the King catchment area. This statistic is due both to students who transfer out of King to other neighborhood schools, charters and focus options, and to transfers into King from students who live in other neighborhoods. When compared to the neighborhood school demographic, transfers out have been disproportionately White students, and transfers in have been disproportionately students of color.

Schools v. neighborhoods: Double-digit racial disparities



Percent difference between the share of enrolled students of color compared with the share of students of color residing in the neighborhood

Schools v. neighborhoods: Double-digit economic disparities



Percent difference between the share of enrolled low-income students compared with the share of low-income students residing in the neighborhood.

This data has reinforced and clarified the findings we reported in June. We see that potential changes to the transfer system may bring enrollment at some schools more in line with the population of the neighborhoods they are meant to serve. However, SACET also recognizes that these steps alone will not offset the fact that different neighborhood compositions, along with different school building sizes, are likely to result in inherently different opportunities at neighborhood schools across the district.

Current system destabilizes schools and contributes to program inequities

Reviewing data and listening to families reinforced the extensive evidence offered in our preliminary report. We find that the enrollment and transfer system feeds some schools and bleeds others of the predictable enrollment that is key to providing equitable access to the high-quality instruction, curriculum, support, and other educational resources called for by the Racial Educational Equity Policy.

When students transfer out of their neighborhood school, public money follows them. Enrollment at the schools on the losing end of the transfer equation often falls far short of what the district considers the minimum necessary to provide “adequate staffing and programming across all grade levels.” Private money also follows students because wealthy families can raise it to augment staffing and programs at their schools through foundations. Schools with relatively low enrollment and concentrated poverty offer fewer resources and programs than those with higher enrollment and little poverty.

Over time, schools with weak programming attract even fewer neighborhood families. This loss has been particularly acute for a number of K-8 schools at the middle-grade level and schools in gentrifying neighborhoods. Low enrollment in grades six through eight means students are exposed to far fewer curricular, elective and athletic options than students in comprehensive middle schools enjoy. “It is bigger than the transfer policy,” one community member told us at a listening session this summer. “It shouldn’t take White kids for electives to come to a school.”

Factors driving school choice

Our listening sessions over the summer reinforced and illuminated themes that were visible from the data we reviewed. We learned a lot about what drives families to choose one school over another. We also learned what limits their ability to choose a different school.

To begin, we learned that many families were not aware that a transfer process existed, knowing only of their assigned neighborhood school option. Families who are aware they have other choices make decisions about where their children attend school based, in part, on how they perceive school staff values them. Parents talked about the importance of having their children attend schools that are welcoming, where they would see other children who looked like them and shared their culture, and where they would be known and looked after. “I am a single parent and need those caring people,” said a participant at one session.

Next, families raised concerns about gentrification, an issue that has been of concern to our committee for some time. Historically in Portland, African-Americans were confined to North and Northeast neighborhoods through redlining and other mechanisms. Eventually, housing prices and rents increased, eviction rates rose and rentals were converted to condos. Neighborhood standards for architecture, landscaping, noise and nuisance changed. All of these factors pushed out many economically disadvantaged

families of all races, replacing them with young singles and couples, and the neighborhood demographics became wealthier and Whiter.

SACET did not assess the overall benefits or harms of gentrification, but worked to understand the interplay between gentrification and the enrollment and transfer system. We recognize a dynamic tension exists between these two forces, which impacts racial groups differently. Data reveals that wealthier (and often, White) families *move into* the historically African American communities of North and Northeast Portland and then *choose out* by transferring their children to schools outside the neighborhood. On the flip side, the same system forces families of color and economically disadvantaged families to *move out* to more affordable neighborhoods, but provides a way to *choose in* by transferring to historically African American schools. Some community members explained that school transfers allow them to remain connected with communities that share their history and values, and expressed they fears that transfer limits would contribute to the loss of those connections.

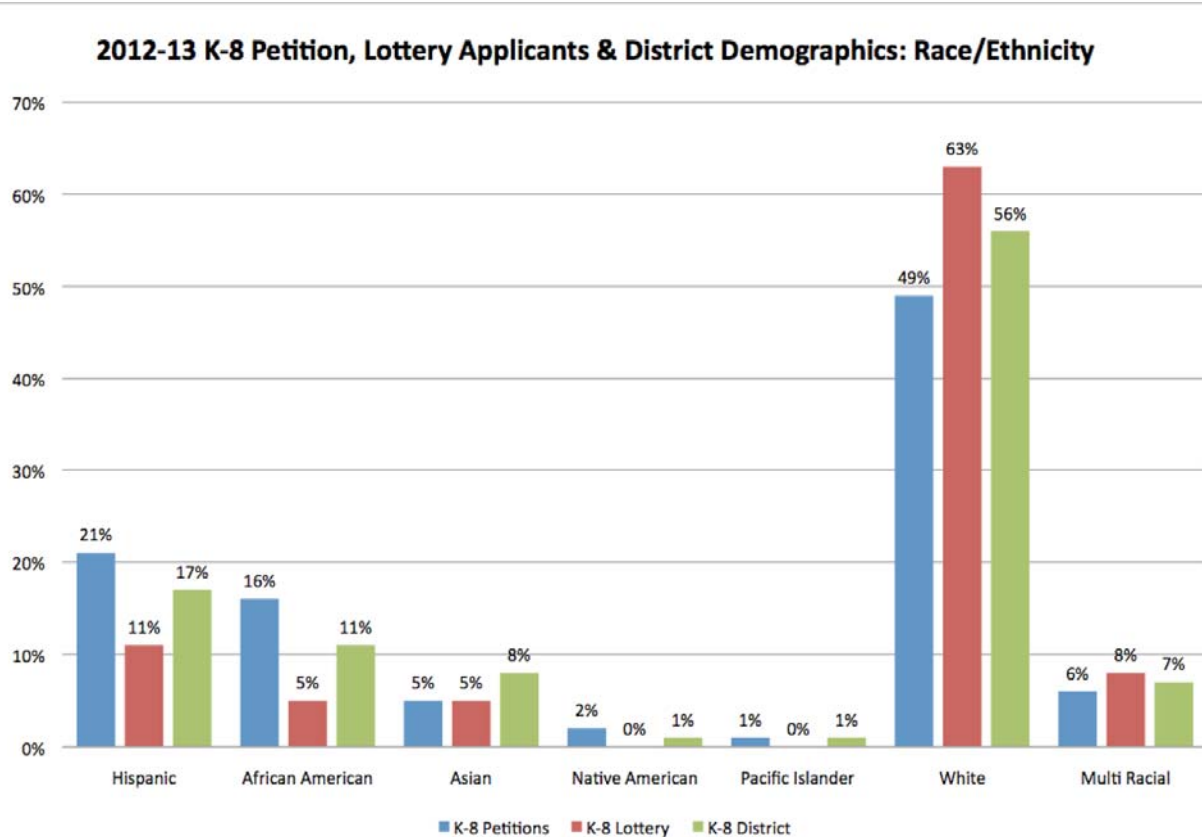
While our committee has been focused on transfers inside the district, we heard at every listening session about the difficulties of families who move even farther away due to the rise in housing prices, and then attempt to navigate the bureaucratic process for transferring across district lines. In conclusion, SACET should look at the issue of inter-district transfers, given that this is a real concern for families of color and economically disadvantaged families.

Next, proximity matters to parents. They want to be close to a supportive network of family and friends. Parents also value keeping children together at the same school. Finally, families are drawn to language immersion because it provides a program where teachers affirm language and culture. PPS should be flexible and agile when locating dual-language programs so that emerging bilingual students will have equitable access in the future, even if they are priced out of their current neighborhood or district.

Factors limiting school choice

The enrollment and transfer system is complicated and poses many barriers. As mentioned, many families represented at listening sessions did not know about the transfer process, while those who did described the process as confusing, time-consuming and inhospitable.

Data shows that lower percentages of families of color and economically disadvantaged families use the annual lottery to request transfers when compared to the petition process.



This may be because the timing of the lottery requires families to begin thinking in September about where their child should attend school the following year. Families who don't expect to make school choice decisions so early may miss the lottery entirely. Families who attempt to apply may be limited by the fact that the online application is in English only. Paper applications are available at the district office and in schools in five out of the 91 current languages spoken in the district. We heard from emerging bilingual families that their older children completed lottery transfer applications on their behalf.

Some families said unwelcoming school environments, disproportionate discipline of students of color and persistent achievement disparities made them distrust the school system – and by extension, the enrollment and transfer system. District employees losing their paperwork or denying transfers compounded the distrust. Some participants admitted to falsifying their address to enter a school. “Figure out a better way,” one asked, “so people can go where they are comfortable without having to lie.”

Currently, the pool of lottery applicants tends to be disproportionately White and not living in poverty. During deliberations about how to increase diversity at focus option schools, which fill most of their slots through the lottery, SACET noted the importance of the current priority for co-enrolled siblings. The lottery now puts the siblings of students who've already been granted a transfer first in line. Maintaining the current level of sibling priority for focus options that are already disproportionately White and middle- to upper class will undermine other efforts to increase access for historically underserved families.

THE RECOMMENDATIONS

The actions called for below are necessary, but they are not sufficient to address our fundamental belief that all students should have access to a high-quality and appropriate education close to their home. Only systemic improvements to PPS will accomplish that goal. SACET recommends the district set high standards for all schools and impose consequences for not meeting them. In the meantime, the actions we recommend will move the enrollment and transfer system in the right direction as the district undertakes other initiatives toward this goal.

Recommendation One: End neighborhood-to-neighborhood lottery transfers

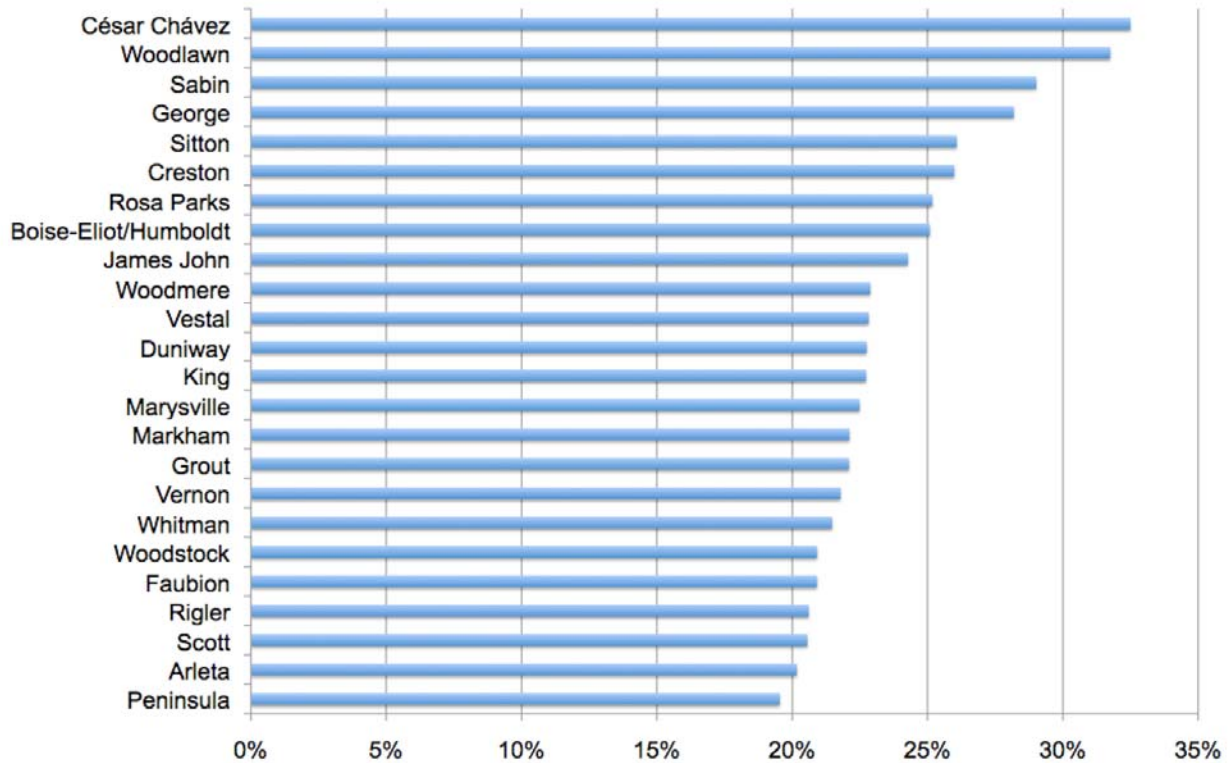
As demonstrated by the chart below, a relatively small number of students transfer between neighborhood schools each year. However, when we apply the Racial Equity Lens to the cumulative effects of those decisions, we see that lottery transfers to neighborhood schools have disproportionately affected schools that serve higher proportions of historically underserved students.

K-8 neighborhood-to-neighborhood lottery transfers

Year	Applied	Approved	Approve %
2011-12	705	524	74%
2012-13	478	340	71%
2013-14	425	338	80%

While district-wide, 16 percent of elementary and K-8 students and 13 percent of middle school students attend a neighborhood school other than their own, the rates are very different at a sub-set of schools.

Schools with highest neighborhood-to-neighborhood transfer rate 2013-14



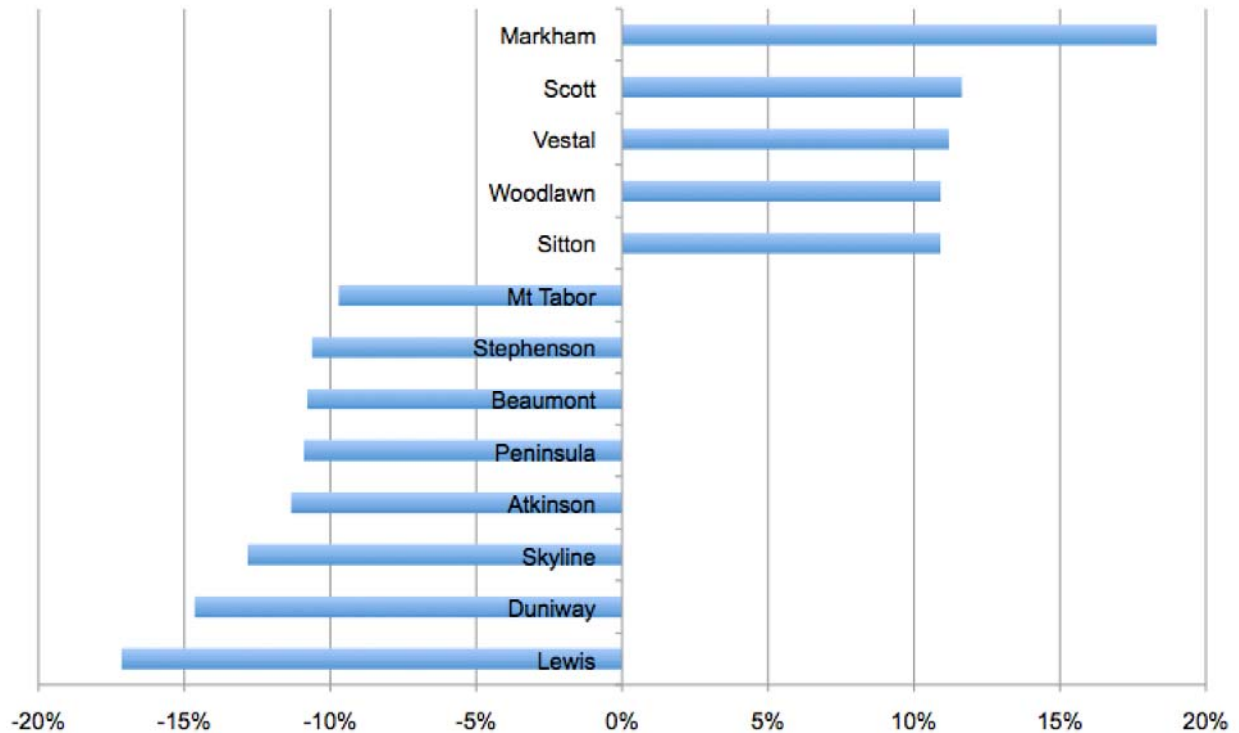
What is particularly concerning is that the lottery does not require a valid reason for approval, just a winning number. SACET believes that the impact of neighborhood lottery transfers is too disruptive to allow without a clearly understood reason.

To supplement the evidence we presented in the June report, we reviewed a data simulation that assigned back to the neighborhood school every student who was approved through a neighborhood-to-neighborhood lottery transfer over the past eight years. It showed that ending neighborhood-to-neighborhood lottery transfers could modestly impact on enrollment at most schools, but the percentage of change possible at a dozen schools is in the double digits. This data simulation reinforces our earlier analysis that ending neighborhood-to-neighborhood lottery transfers would be an important step to stabilize neighborhood schools.

Neighborhood lottery data simulation results

This data simulation illustrates the potential enrollment at some neighborhood schools if there had not been lottery transfers into other neighborhood schools.

Neighborhood lottery ends: Major enrollment changes



This data simulation illustrates the enrollment changes possible at some neighborhood schools. Markham, Scott, Vestal, Woodlawn and Sitton could have a 11 to 17 percent enrollment increase.

For these reasons, ending neighborhood-to-neighborhood lottery transfers is an important step the district must take to ensure that transfers between neighborhood schools are limited to reasons based in fact rather than perceptions.

Possible unintended consequences

Families with fewer housing choices stand to lose an important educational option if transfers to schools in gentrifying areas are limited. As students within the neighborhood begin to attend their neighborhood schools, some schools that have historically been serving students of color will begin to serve more White students, which may have unintended consequences. We recommend a culturally relevant petition process to help mitigate this possible consequence, and we will explain why in our second recommendation.

This recommendation is supported by 12 of 12 committee members.

Recommendation Two: Strengthen petition process

As mentioned earlier, data has shown us that students of color, economically disadvantaged students and students with disabilities tend to apply for transfer through petition more often than they use the lottery process. And we know many families seek transfers between neighborhood schools for compelling reasons, including to keep siblings together, to be near child care and other important family supports, and to attend a school that feels more culturally and socio-emotionally appropriate for the students. The petition process also differs from the lottery in that it is based on people telling their story, something families of color have told our committee that they're more comfortable with than a random lottery. This suggests that the petition process is a more appropriate way for families to request transfers into other neighborhood schools. With a strong focus on cultural relevancy, the process could, in fact, decrease barriers for historically underserved families. Furthermore, the petition process may accomplish one key objective that a lottery can't: it can give the district important information about why students are leaving some schools and seeking others.

If our first recommendation is approved, the petition process will be the only way for families to request transfer into different neighborhood school. With this in mind, we ask the Superintendent to ensure improvements to the petition system so that it is aligned with the Racial Educational Equity Policy and becomes a known and trusted remedy for families.

Recommendation 2.1 Cultural competence and flexibility to be hallmarks of petition process

We envision a system where families seeking transfers can tell their stories to district employees who have been trained to apply the Racial Equity Lens and can review the petitions with intelligence and humanity. To respond to the historical disenfranchisement of communities of color through subjective decision-making, PPS will need to establish clear, flexible, culturally relevant protocols that challenge the system to respond to the needs of underserved communities. PPS must make sure families know that the petition system exists and how it works. The district must monitor petition volume and results to make sure the process is serving its intended purpose.

Recommendation 2.2 Collect and use reasons for transfer

We further recommend the district formally monitor the reasons families seek transfer out of neighborhood schools, including issues such as disproportionate discipline, a wider academic achievement gap for students of color, a poor school climate, or

ineffective leadership. We suggest involving the district's ombudsman in the process. The district should also notice and react when many students seek transfers out of one school. We're not suggesting officials try to talk parents out of transferring. Rather, the qualitative and quantitative data should be treated as an early warning system that alerts the district to problems at a school so that they can be solved with support, training and staffing before they become entrenched. Further, the district should take note of why some schools attract families and foster those positive attributes at other schools. Finally, the district should regularly audit the decisions made about petition requests to ensure district officials award transfers equitably. We believe a petition process such as the one we've described would ultimately strengthen neighborhood schools rather than deplete them.

Possible unintended consequences

The district originally created the lottery process in response to a perception of abuse and insider trading around transfers. A petition process is both less transparent and more subjective than a lottery process. PPS will have to display a high degree of accountability in order for the proposed change to build trust across the community.

People who feel pushed out by the old system may not trust the new one. "When you feel unwelcome at a school, how much further away does the district process feel?" we heard at SEI. "Why would you believe that the district would do right by you?" The district will need to act in good faith over an extended time to convince parents that they can speak the truth.

If more families are allowed to transfer outside of what has been a spring transfer cycle, the district may need to extend staffing timelines.

This recommendation is supported by 12 of 12 committee members.

Recommendations addressing focus option schools

Introduction

Right now, the district offers several types of focus option schools for K-8 students, defined in policy as “separate Board-recognized school or program structured around a unique curriculum or particular theme.” Focus options include 16 dual-language immersion schools and seven focus option schools with different themes or pedagogies. Immersion schools are the subject of Recommendation Five. A guide summarizing how our recommendations would affect each focus option school is included in the appendix.

SACET closely studied enrollment and transfer activities for a subset of focus option schools that serve the district as a whole. With the exception of the Richmond Japanese Immersion program, these schools do not fall within the district’s immersion expansion plan. This group includes Creative Science School, da Vinci Arts, Odyssey, Richmond and Winterhaven Math and Science – schools that draw all of their students through a lottery. The group also includes Buckman Arts and Sunnyside Environmental, which offer unique learning opportunities but draw students mostly from their neighborhoods.

During our review of focus option schools, we came to a crucial conclusion: PPS has not followed its own policy regarding these schools. The district’s Educational Options Policy is designed to provide consistent guidelines and procedures for schools, including focus options. The policy states that the Board intends focus options to “actively seek to create a sense of community in which racial, economic and cultural isolation are reduced,” and to “promote equity and diversity in the admission of students to educational options and minimize barriers to participation in educational options.”

Some of the major omissions in promoting equity and accountability:

- The district has not established an evaluation system to assess ongoing needs and determine future status, as called for in the Educational Options Policy. Nor does the focus option lottery structure “effectively promote equity and diversity in the admission of students and minimize barriers to participation.” Evidence:
 - Of the seven focus options that we studied closely, we found that almost 75 percent of students are White, substantially higher than the district average of 56 percent White students. Less than 20 percent of their students are economically disadvantaged, compared to 45 percent of all

district students. This subset of focus options enrolls lower rates of students receiving special education services than the district average.

- In 2012 and 2013, the district closed Ockley Green Arts program and Harriet Tubman Young Women’s Leadership Academy, two North Portland focus options that served mostly students of color.
- The district has not followed the direction to “facilitate the siting of educational options to maximize the distribution of options throughout the district.” In fact, focus options are clustered in Southeast Portland and tend to draw the vast majority of their student body from the immediate surrounding neighborhoods.
- The stated purpose of focus options – to “meet the different learning needs and educational interests of all students” – is so broad that it could encompass almost any type of program, which makes assessment and decision-making around focus option schools very difficult. It is unclear what role focus options are intended to play within the full portfolio of PPS schools and how effective they are in meeting their stated missions. SACET has asked for several years for PPS to provide a more specific explanation of the function focus option schools are meant to serve. This missing information constrains the committee’s ability to recommend improvements. At minimum, Portland Public School leaders should make sure focus option schools meet needs that neighborhood schools can’t meet.

Given that PPS already has in place a policy framework for evaluating and assuring equity and quality in focus options schools, we recommend the immediate implementation of the following strategies for all focus options schools, including dual-language immersion programs:

Recommendation 3: Implement a quality review process for focus option schools.

In order to ensure that focus options truly meet needs that cannot be met by neighborhood schools, the district should establish a clearer rationale for focus options, implement a routine evaluation process with clear benchmarks, and systematize supports and expectations for focus options.

Recommendation 3.1: Establish clear rationale and benchmarks for focus option schools.

PPS leaders should immediately clarify the rationale for focus option programs, calling out intentional distinctions between the purpose and structure of focus options versus neighborhood schools. Soon after that, PPS should set benchmarks for essential factors

of focus options, including student body diversity that closely approximates the district in terms of race, ethnicity, income, children receiving special education, and geography. Teaching practices and school culture should match each school's purpose and be culturally inclusive. The district should incorporate lessons learned from focus option schools that were closed in the past.

Recommendation 3.2: Establish evaluation and support system for focus option schools.

The district should enact an evaluation and support system as called for in the Educational Options Policy. Evaluation should include clear criteria that are aligned with the Racial Educational Equity Policy. As part of the process, focus option successes should be shared with neighborhood schools in order to foster innovation and improvement.

As spelled out by the Educational Options Policy: "The district shall collaborate with educational options to assess their ongoing assistance needs and determine their future status, including renewal, modification, termination, replication, or transition from program to school." Unless and until such a system is created, the district should refrain from opening any additional non-immersion focus options.

Recommendation 3.3 Review focus option locations as part of the district-wide boundary review

As part of the boundary review process, the School Board and Superintendent should study the effect a focus option's location has on neighborhood schools' enrollment, especially where focus options are already clustered in one part of the district. Leaders should ensure that neighborhood schools near focus options have boundary areas large enough to offset the inevitable draw that the focus options present. PPS should take into account the location of other educational options, public and private, when performing this assessment.

Possible unintended consequences

We believe that additional accountability and supports for focus options will result in more students of color enrolling in those schools. PPS should prepare for this change by ensuring ample training and assistance for focus option staff, students and families in order to avoid future students of color being neglected or marginalized.

This recommendation is intended to swiftly bring about more meaningful understanding and oversight of focus options. But we are concerned that it could result in a lengthy process that delays the kind of changes that would improve equity. To mitigate this concern we encourage the superintendent and school board to schedule time during the 2014-15 school year to clarify the purpose of focus option schools and conduct an initial focus option evaluation.

This recommendation is supported by 12 of 12 committee members.

The consensus vote above is the culmination of many perspectives, including a belief that focus options should not be subject to additional evaluation beyond that which is required of every school by the district and state, and a strong feeling that focus options, by nature of their exclusivity, will never be equitable and should be closed now in order to accelerate program equity at neighborhood schools. Additionally, there was a call to begin moving existing focus options to other locations, given their close proximity now and the significant impact it has on nearby schools. However, consensus was to allow the evaluation process to serve as the mechanism for deciding if and when any focus options should be relocated.

Recommendation Four: Expand access to dual-language immersion programs

The Educational Options Policy does not distinguish dual-language immersion programs from other focus options. However, we find that dual-language immersion programs designed to draw half of their students from the partner language stand out from other focus option schools because there is clear evidence of increased achievement for emerging bilingual students who are enrolled in these programs. Our committee fully supports the district's efforts to expand dual-language immersion programs, particularly when offering programs to emerging bilingual students and other historically underserved students within their neighborhood schools. We're aware that African-American students are underrepresented in dual-language programs; a phenomenon that points to the need for effective outreach to historically underserved populations.

Possible unintended consequences

There are lessons to be learned from the haphazard way PPS has sited focus option schools in the past that should be applied to siting immersion programs, as well as other

focus options, in the future. While we applaud district leaders for locating new dual-language immersion programs in neighborhoods that are accessible to emerging bilingual students, we note that more than half of our current programs – at Beach, Bridger, César Chávez, James John, Kelly, King, Lents, Rigler, Sitton and Scott – are located in neighborhoods identified by the city as at-risk of gentrification. As we heard in listening sessions, gentrification can drive families to other parts of the district or out of the district completely. Unless PPS establishes greater flexibility and agility in siting programs, a potential consequence of future gentrification is reduced equity of access for emerging bilingual students and other students of color. To ensure programs remain accessible to the students who have the potential to benefit the most, the district should be willing to either move programs to new locations following population changes, or to provide greater transportation supports and innovative partnerships with neighboring districts.

We are concerned that co-locating immersion and neighborhood programs in the same buildings has resulted in resource imbalances in the past and is a difficult model to maintain equitably. However, we're aware that shutting down neighborhood programs in favor of expanding language immersion programs carries with it significant consequences. For example, it could split up families where some children are enrolled in the language program and others aren't. It could also exacerbate segregation by shifting many native language speakers to a handful of schools.

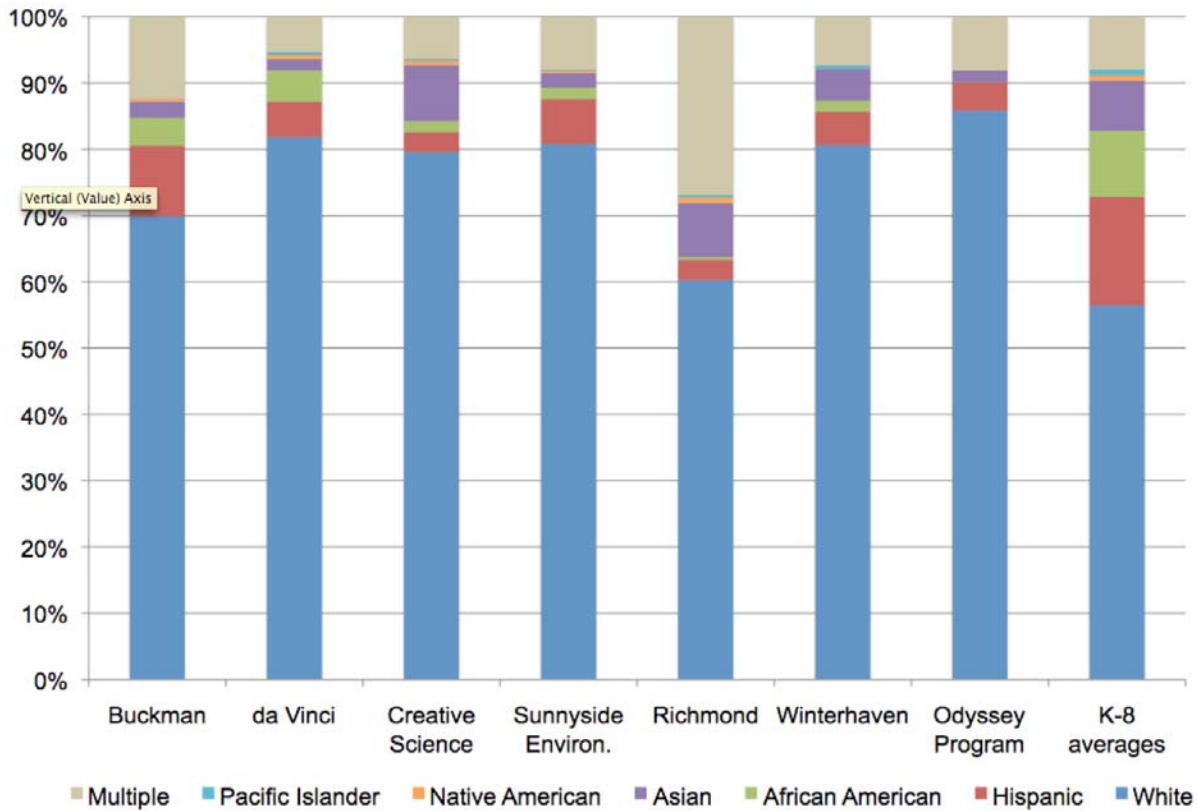
This recommendation is supported by 12 of 12 committee members.

Recommendation Five: Modify the Focus Option Lottery System

Despite the lack of clarity about the purpose of non-immersion focus options, we are committed to making changes to the enrollment and transfer system that would immediately begin increasing equitable access to focus options.

The graph below shows the current demographic makeup of seven focus option schools and programs.

Race of students at focus option schools



SACET proposes both adjustments to the lottery process and to other student support systems to address the current imbalances. It should be noted that PPS currently uses a weight for socio-economic status, and not race, so a more racially sensitive, yet still legally allowable factor, needs to be developed for future lotteries. We know that, in the last two years, a few major schools districts have made inroads into creating such criteria. PPS should consult with them.

Currently, lotteries for two-way dual language immersion programs already have factors for native language and residency. The recommendations described below are geared toward non-immersion and one-way immersion programs, including Richmond-Mt Tabor-Grant Japanese Immersion and Ainsworth-West Sylan-Lincoln Spanish Immersion. Positive results should be considered for implementation at dual-language immersion programs in the future.

Data simulation: Lottery changes could improve focus option diversity

To test whether it was possible to make focus options look more like the district's demographics, we conducted a data simulation using nine years' worth of lottery applicant data. We knew which applicants had attended Head Start and which qualified for free or reduced-price meals, and that gave us an idea of their socioeconomic status. We also understood that there is a strong correlation between these economic factors and race.

In the simulation, we automatically approved all economically disadvantaged students, filling up 45 percent of the available slots. If more than 45 percent of applicants were economically disadvantaged, we balanced those who were approved by district cluster. We used 45 percent because that is the current average rate for K-8 students in the district who qualify for free or reduced-price meals. We approved siblings of current focus option students next, balancing them by cluster, too.

We found under this model that the percentage of students from economically disadvantaged families would rise considerably, but at 33 percent would still be well below the district average of 45 percent. Balancing lottery approvals geographically would somewhat increase the geographic diversity of students.

Recommendation 5.1: Lottery priorities to balance schools by income and geography and recognize the importance of co-enrolled siblings.

Our recommended lottery priorities for focus option schools and programs, not including dual-language immersion, are as follows:

1. Reserve for economically disadvantaged applicants a percentage of slots corresponding to the district-wide percentage of students who qualify as economically disadvantaged; i.e., who qualify for free or reduced-price meals or are enrolled in Head Start for Pre-kindergarten.
Tiebreakers, if more applicants than slots:
 - a. Equal numbers of students selected from the range of high school clusters represented in the applicant pool.
 - b. Sibling preference changes to a weight that is applied within each geographic grouping. In other words, co-enrolled siblings will be selected first within each group of economically disadvantaged students by high school region.
 - c. A random number will be used as a final tiebreaker.
2. Remaining slots will be evenly distributed by high school region.
Tiebreakers, if more applicants than slots:
 - a. Co-enrolled siblings will be selected first within each group of students by high school region.

- b. In the case of more co-enrolled siblings than slots by high school region, a random number will be used as a final tiebreaker.
- c. If there are more non-sibling applicants than remaining slots by high school region, a random number will be used as a final tiebreaker.

Recommendation 5.2: Student supports to improve equity of access to focus options

Lottery changes will help, but we should not expect focus options to mirror the district demographics without innovative efforts at culturally relevant outreach. Focus option schools are currently not permitted to market themselves beyond word of mouth, which is insufficient to bring about change in the demographic makeup of the schools. Current partnerships with community organizations serving culturally specific groups could be leveraged to promote greater awareness and interest in focus options.

Focus options would also benefit from affordable afterschool programs, such as those offered in the SUN school system. With focus options clustered mostly in Southeast Portland, achieving equitable access may require district-provided transportation, though we acknowledge that transportation has not improved equity in the Richmond Japanese Immersion Program.

Possible unintended consequences

The lottery simulation had its limitations. For instance, when we tried to see how the simulated results would filter through several years of enrollment at each school, we found that some of the students who would have been approved under the new methodology had left the school district. There were limitations in the data that prevented us from directly testing for racial impact. We still must test how our recommended lottery modifications will alter the racial makeup of focus option schools. We believe that the modifications we propose will be an improvement over the current system and certainly won't be worse than what we have now, but the simulation wasn't sophisticated enough to say this definitively.

We recommend that the district continue to experiment with simulations and then adopt lottery preferences that appear to best meet the benchmarks adopted by the School Board.

SACET struggled with the inherent tension that arises when sibling priority is a factor in admission to focus options. Since focus options are ostensibly meant to serve students' individual needs, not those of a whole family, some members saw a clear rationale for

ending all levels of sibling priority into these specialized schools and programs. At the same time, any limitations on siblings attending school together may be a barrier to access, particularly for historically underserved families seeking a sense of community and belonging for their children. We are concerned that a consequence of the sibling change proposed above will be to continue to deter students of color from applying to focus options. However, we are also concerned that continuing to offer sibling priority, even at a lower level than in the current system, will continue to shut out students whose intellectual and socio-emotional needs are a strong match with the focus option. A possible way to mitigate both of these concerns is for PPS to investigate whether qualitative criteria should be added to the application process.

If done wrong, a consequence of increased focus options marketing efforts could be further destabilization of neighborhood schools. To avoid this, similar outreach efforts are needed to highlight the strengths of each neighborhood school--particularly those disproportionately impacted by focus options and other transfer choices.

This recommendation is supported by 10 of 12 committee members.

Minority view: Due to time constraints, focus option schools and the proposed changes to the lottery system did not undergo the same scrutiny as other facets of the enrollment and transfer system. I disagree with this recommendation as it stands, and I suggest that district leaders – and perhaps, the next iteration of SACET – take the time to delve more deeply into focus option schools and the lottery system.

Minority view: Regarding Recommendation 5.1, there is no reason for families with multiple children to have any privilege when applying for lottery slots over families with one child.

Recommendation Six: Supporting students receiving special education services

Applying the Racial Equity Lens, we saw that students of color are overrepresented among students who receive special education, particularly services that cannot be offered at their neighborhood schools. Students who receive specialized services frequently experience a greater degree of movement and disruption than their peers. Many students are placed outside of their neighborhood schools in order to access services, and often experience this disruption more than once in their school career as programmatic availability or needs change. This results in families being split across

more than one school, separating the student from family and peers and compromising parents' ability to engage in their child's education.

Recommendation 6.1 Continuity for students assigned away from their neighborhood schools for special education services.

SACET recommends that students with disabilities who are assigned to services outside of their neighborhood school be allowed to remain at that school to the highest grade, if their Individualized Education Program changes and they transition into general education. Further, we advocate that preference be granted for siblings to have the option to join them at the same school.

Recommendation 6.2 Move toward cluster-based, and eventually neighborhood school-based, programming for all students receiving special education services.

The committee unanimously encourages the district to align services and concentrate programs within clusters so that special education students experience fewer transitions. One benefit of Universal Design is that it reduces the need for students to be moved out of their neighborhood school and minimizes transitions to different schools.

Recommendation 6.3 Clarify policy language

SACET recommends that Policy 4.10.051-P Student Enrollment and Transfers be amended to acknowledge that the right to attend the neighborhood school or the right to request a transfer may be superseded for a student with disabilities by the assignment to specialized program services.

This recommendation is supported by 12 of 12 committee members.

APPENDIX

SACET BELIEF STATEMENTS

We were guided in our work by these shared principles:

- The strength of the PPS system is our prevailing consideration - even over individual needs and desires.
- Portland's vitality is rooted in strong neighborhoods, with neighborhood schools at the heart of local communities.
- Neighborhood schools throughout the system should have equitable programming and resources.
- We acknowledge that access to choice systems via lottery is not a luxury afforded to all, and therefore weakens the ability of PPS to equitably meet the needs of all students.
- The enrollment system should not exacerbate patterns of segregation by race, class or disability, nor should it serve only those who are privileged.
- SACET supports a meaningful boundary review process that will contribute to right-sized enrollment and equitable neighborhood schools.
- SACET supports lessening the degree of choice by lottery in favor of strengthening neighborhood enrollment and choice through petition.
- SACET applauds the Superintendent's 2013 decision to increase the equity allocation for school funding, leading to greater parity in program offerings.
- Focus option schools – which, by policy, serve the general population – should reflect the demographics of the district.
- The district needs to provide strong English as a Second Language programs as close to home as possible for Emerging Bilingual students so that traveling for essential services is eliminated. PPS also should eliminate access barriers for EB students to attend schools with more ESL course offerings and programs such as dual-language immersion.

- SACET believes that before making a policy change, all recommendations must be tested with data simulation in order to refine implementation and mitigate unintended negative consequences.
- Further community conversations across diverse populations must be undertaken to help discern the potential consequences of policy changes. It is clear that decisions have been made in the past without being informed by those communities that are historically underserved.

K-8 Focus Option Schools and Programs						
Name	Grade Structure	HS Cluster	Program Type	Feeds to	Current lottery priorities	Proposed lottery priorities
Ainsworth	K-5	Lincoln	Spanish Immersion	West Sylvan MS, Lincoln HS	15% slots for native Spanish speakers 50% set aside for Ainsworth neighborhood students Geographic priority for Lincoln, Wilson clusters Sibling preference in each geographic/language group Small weight for low-income, gender	Add low-income preference into each geographic/language group
Atkinson	K-5	Franklin	Spanish Immersion	Mt. Tabor MS, Franklin HS	50% slots for native Spanish speakers 50% set aside for Atkinson neighborhood students Geographic priority for Franklin, Cleveland clusters Sibling preference in each geographic/language group Small weight for low-income, gender	None at this time Consider adding low-income priority in future
Beach	K-8	Jefferson/Roosevelt	Spanish Immersion	Roosevelt HS	50% slots for native Spanish speakers 50% set aside for Beach neighborhood students Geographic priority for Jefferson, Roosevelt clusters Sibling preference in each geographic/language group Small weight for low-income, gender	None at this time Consider adding low-income priority in future
Bridger	K-8	Franklin	Spanish Immersion	Franklin HS	50% slots for native Spanish speakers 50% set aside for Bridger neighborhood students Geographic priority for Franklin, Cleveland clusters Sibling preference in each geographic/language group Small weight for low-income, gender	None at this time Consider adding low-income priority in future

K-8 Focus Option Schools and Programs

Name	Grade Structure	HS Cluster	Program Type	Feeds to	Current lottery priorities	Proposed lottery priorities
César Chávez	K-8	Roosevelt	Spanish Immersion	Roosevelt HS	50% slots for native Spanish speakers 50% set aside for César Chávez neighborhood students Geographic priority for Jefferson, Roosevelt clusters Sibling preference in each geographic/language group Small weight for low-income, gender	None at this time Consider adding low-income priority in future
James John	K-5	Roosevelt	Spanish Immersion	George MS, Roosevelt HS	50% slots for native Spanish speakers 100% set aside for James John neighborhood students	None at this time Consider adding sibling preference in future
Lent	K-8	Franklin	Spanish Immersion	Franklin HS	50% slots for native Spanish speakers 50% set aside for Lent neighborhood students Geographic priority for Franklin, Cleveland clusters Sibling preference in each geographic/language group Small weight for low-income, gender	None at this time Consider adding low-income priority in future
Rigler	K-5	Madison	Spanish Immersion	Beumont MS, Madison HS	50% slots for native Spanish speakers 100% set aside for Rigler neighborhood students Sibling preference in each language group	None at this time
Scott	K-8	Madison	Spanish Immersion	Madison HS	50% slots for native Spanish speakers 100% set aside for Scott neighborhood students Sibling preference in each language group	None at this time
Sitton	K-5	Roosevelt	Spanish Immersion	George MS, Roosevelt HS	50% slots for native Spanish speakers 100% set aside for Sitton neighborhood students	None at this time Consider adding sibling preference in future

K-8 Focus Option Schools and Programs

Name	Grade Structure	HS Cluster	Program Type	Feeds to	Current lottery priorities	Proposed lottery priorities
King	K-8	Jefferson/ Grant	Chinese Immersion	To be determined	15% set aside for native Chinese speakers 40% set aside for students from Chinese Head Start 35% set aside for siblings of students attending King 10% set aside for other transfers	None at this time
Woodstock	K-5	Cleveland	Chinese Immersion	Hosford MS Cleveland HS	35% set aside for native Chinese speakers 50% set aside for Woodstock neighborhood students Sibling preference in each geographic/language group Small weight for low-income, gender	None at this time Consider adding low-income priority in future
Kelly	K-5	Franklin	Russian Immersion	Lane MS Franklin HS	50% slots for native Russian speakers 50% set aside for Kelly neighborhood students Resident students prioritized over non-residents Sibling preference in each geographic/language group small weight for low-income, gender	None at this time
Richmond	K-5	Franklin	Japanese Immersion	Mt. Tabor MS Franklin HS	15% set aside for native Japanese speakers Sibling preference in each geographic/language group Small weight for low-income, gender	Add low income preference and geographic preference
Roseway Heights	K-8	Madison	Vietnamese Immersion	To be determined	50% slots for native Vietnamese speakers	None at this time Consider adding sibling preference in future
Buckman	K-5	Cleveland	Arts	Neighborhood students to Hosford, Cleveland	Neighborhood students are guaranteed and do not have to apply Sibling preference Small weight for low-income, gender	Add low income preference and geographic preference
Creative Science	K-8	Madison	Constructivist	None	Sibling preference Small weight for low-income, gender	Add low income preference and geographic preference

K-8 Focus Option Schools and Programs

Name	Grade Structure	HS Cluster	Program Type	Feeds to	Current lottery priorities	Proposed lottery priorities
daVinci	6-8	Grant	Arts	None	Sibling preference Small weight for low-income, gender	Add low income preference and geographic preference
Odyssey @ Hayhurst	K-8	Wilson	Living history curriculum	None	Sibling preference Small weight for low-income, gender	Add low income preference and geographic preference
Sunnyside	K-8	Franklin	Thematic environmental curriculum	Neighborhood students to Franklin	Neighborhood students are guaranteed and do not have to apply Sibling preference Small weight for low-income, gender	Add low income preference and geographic preference
Winterhaven	K-8	Cleveland	Math & Science	None	Sibling preference Small weight for low-income, gender	Add low income preference and geographic preference



Board of Education Informational Report

MEMORANDUM

Date: November 4, 2014

To: Members of the Board of Education

From: Amanda Whalen

Subject: 2014-15 Achievement Compact

Pursuant to Oregon statute, the Portland Public Schools Achievement Compact Advisory Committee made recommendations to the Board of Education for setting targets on the Portland Public Schools 2014-15 Achievement Compact. Based on the resolution that the Board passed in July 2014 regarding the Smarter Balanced Assessment, the Committee unanimously recommended that the Board decline to adopt targets for the metrics that were previously based on the OAKS exam. This would allow a year to develop baseline data and determine the validity and reliability of the assessment.

On October 14, 2014 the Board of Education voted to approve the 2014-15 Achievement Compact for Portland Public Schools and adopted the recommendation of the Achievement Compact Advisory Committee and left targets for 3rd grade reading, 5th grade math and 8th grade math blank.

On October 27, 2014 Dr. Nancy Golden, Chief Education Officer, sent a letter to the Board Co-Chairs and the Superintendent stating that PPS' Achievement Compact was not accepted and that the District had until immediately following the next board meeting to resubmit the Achievement Compact with completed targets.

The OEIB and ODE have indicated that there will not be penalties for Districts that do not make targets.

Below are four possible options for setting the targets for the Achievement Compact:

- 1) **Set the Targets Based on the Previous Results on OAKS.** This is the recommendation from the Oregon Education Investment Board and the Oregon Department of Education. Following the methodology previously recommended by the Achievement Compact Advisory Committee, the targets would be:

Metric	All Students		Historically Underserved	
	2013-14	Target	2013-14	Target
3 rd Grade Reading	74.3%	93.6%	59.6%	89.3%
5 th Grade Math	67.7%	75.7%	50.1%	64.6%
8 th Grade Math	67.2%	75.7%	50.0%	64.6%

- 2) **Set Aspirational Targets of 100% for Each Metric.** At the October 7, 2014 Board Meeting, Director Morton recommended that the Board adopt targets of 100% acknowledging the Board's belief and expectation that every student can succeed.
- 3) **Set Targets Based on Other States' Results on the Smarter Balanced Assessment.** Based on the results from other states that were early adopters of the Smarter Balanced Assessment, Deputy Superintendent Saxton estimated that only 35-40% of Oregon's students will pass the test in the first year.
- 4) **Ask the OEIB to Set PPS' Targets.** The board could decline to set targets and ask the OEIB to complete the targets for the district.

Attached please find the letters from Chief Education Officer Golden and Deputy Superintendent Saxton.

College and Career Ready: Are students completing high school ready for college or career?										
	2008-09 Cohort	Disadvantaged	2009-10 Cohort	Disadvantaged	2010-11 Cohort	Disadvantaged	2011-12 Cohort Goal	Disadvantaged Goal	2014-15 Cohort 4-yr. Goal	Disadvantaged 4-yr Goal
4-Year Graduation Rate	63.1	54.0	66.9	56.7	NA	NA	73.9	67.5		
5-Year Completion Rate	79.7	73.8	NA	NA	89.7	86.6				
3+ College Level Courses	NA	NA	NA	NA	NA	NA	30.5	19.7		
Post-Secondary Enrollment	66.4	59.3	NA	NA	NA	NA	80.7	76.2		

Progression: Are students making sufficient progress toward college and career readiness?										
	All Students 2011-12	Disadvantaged	All Students 2012-13	Disadvantaged	All Students 2013-14	Disadvantaged	Goal (All) 2014-15	Disadvantaged Goal	4-Year Goal (All) 2017-18	Disadvantaged 4-yr Goal
Kinder Assessment Participation	NA	NA	NA	NA	92.6	91.6	95	95		
3rd Grade Reading Proficiency	76.4	63.2	75.3	61.3	74.3	59.6	100	100		
5th Grade Math Proficiency	65.5	50.3	67.3	51.1	67.7	50.1	100	100		
6th Grade Not Chronically Absent	89.4	85.4	89.5	86.1	93.0	91.2	93.7	92.1		
8th Grade Math Proficiency	66.7	51.5	64.5	49.1	67.2	50.0	100	100		
9th Grade On Track to Graduate	NA	NA	NA	NA	83.2	74.7	88.2	79.7		
9th Grade Not Chronically Absent	79.9	73.1	81.5	74.8	84.3	78.3	85.9	80.5		

Equity: Are students succeeding across all buildings and populations?					
	2012-13	2013-14	2014-15	2015-16 Goal	4-Year Goal (2018-19)
Priority & Focus Schools (Includes schools with lowest overall rating on Oregon Report Card)	NA	16	18	18	

Local Priorities: What other measures reflect key priorities in the district? (Optional, up to 3)										
	All Students 2011-12	Disadvantaged	All Students 2012-13	Disadvantaged	All Students 2013-14	Disadvantaged	Goal (All) 2014-15	Disadvantaged	4-Year Goal (All) 2017-18	Disadvantaged 4-yr Goal

Investment: What is the public investment in the district? (Does not include capital investments)				
	2012-13 (Actual)	2013-14 (Budgeted)	2014-15 (Budgeted)	2014-15 QEM calculation of district share
Formula Revenue	\$339,960,652	\$371,576,653	\$393,503,602	\$472,559,307
Local Revenue (Not passed through formula)			\$127,810,726	
Federal Revenue			\$62,226,237	
State Grants (Not passed through formula)			\$16,652,387	

KEY for 20142-015 ACHIEVEMENT COMPACT
Italics Bold = District provided goal
Bold = ODE provided outcome
Italics = District provided optional field
 NA = Not Available

Equity: Are students succeeding across all buildings and populations?

2008-09 Cohort									
	Economically Disadvantaged	Limited English Proficient	Students with Disabilities	Black (Not of Hispanic origin)	Hispanic origin	American Indian / Alaska Native	Pacific Islander	Asian (Not included in Disadvantaged)	TAG (Not included in Disadvantaged)
4-Year Graduation Rate	55.8	47.5	31.0	52.6	54.2	29.0	61.2	76.5	89.4
5-Year Completion Rate	76.6	57.1	63.7	72.2	68.8	59.0	80.0	80.7	95.7
3+ College Level Courses									
Post-Secondary Enrollment	58.1	46.8	44.5	65.6	48.9	42.3	58.8	81.8	81.2
2011-12 Sub-group Outcomes									
	Economically Disadvantaged	Limited English Proficient	Students with Disabilities	Black (Not of Hispanic origin)	Hispanic origin	American Indian / Alaska Native	Pacific Islander	Asian (Not included in Disadvantaged)	TAG (Not included in Disadvantaged)
Kinder Assessment Participation									
3rd Grade Reading Proficiency	60.3	48.5	55.4	51.5	55.8	60.0	60.5	75.7	99.8
5th Grade Math Proficiency	47.7	40.5	37.6	32.3	49.1	50.0	35.7	75.7	97.4
6th Grade Not Chronically Absent	84.2	89.1	81.9	84.4	85.5	75.0	88.2	97.4	95.0
8th Grade Math Proficiency	50.6	39.1	31.2	43.6	51.1	38.1	50.0	77.3	97.2
9th Grade On Track to Graduate									
9th Grade Not Chronically Absent	71.2	79.0	69.6	74.5	70.7	76.1	71.4	88.0	91.7
2009-10 Cohort									
	Economically Disadvantaged	Limited English Proficient	Students with Disabilities	Black (Not of Hispanic origin)	Hispanic origin	American Indian / Alaska Native	Pacific Islander	Asian (Not included in Disadvantaged)	TAG (Not included in Disadvantaged)
4-Year Graduation Rate	57.7	50.8	37.7	53.1	57.2	44.4	56.7	80.3	90.6
5-Year Completion Rate									
3+ College Level Courses									
Post-Secondary Enrollment									
2012-13 Sub-group Outcomes									
	Economically Disadvantaged	Limited English Proficient	Students with Disabilities	Black (Not of Hispanic origin)	Hispanic origin	American Indian / Alaska Native	Pacific Islander	Asian (Not included in Disadvantaged)	TAG (Not included in Disadvantaged)
Kinder Assessment Participation									
3rd Grade Reading Proficiency	57.6	42.5	55.8	49.1	54.6	68.6	52.0	72.5	100.0
5th Grade Math Proficiency	46.7	40.8	40.3	34.2	46.8	58.6	40.0	78.7	98.4
6th Grade Not Chronically Absent	84.9	89.6	81.7	84.9	87.6	80.0	87.5	96.7	94.4
8th Grade Math Proficiency	47.5	29.3	28.3	36.7	46.6	62.5	41.9	74.0	98.0
9th Grade On Track to Graduate									
9th Grade Not Chronically Absent	73.2	80.5	74.5	74.9	75.4	70.6	78.3	93.7	89.9

Portland SD 1J Achievement Compact
2014-2015

2010-11 Cohort									
	Economically Disadvantaged	Limited English Proficient	Students with Disabilities	Black (Not of Hispanic origin)	Hispanic origin	American Indian / Alaska Native	Pacific Islander	Asian (Not included in Disadvantaged)	TAG (Not included in Disadvantaged)
4-Year Graduation Rate									
5-Year Completion Rate	88.5	76.6	82.8	86.9	81.9	82.9	91.1	90.7	97.9
3+ College Level Courses									
Post-Secondary Enrollment									
2013-14 Sub-group Outcomes									
	Economically Disadvantaged	Limited English Proficient	Students with Disabilities	Black (Not of Hispanic origin)	Hispanic origin	American Indian / Alaska Native	Pacific Islander	Asian (Not included in Disadvantaged)	TAG (Not included in Disadvantaged)
Kinder Assessment Participation	92.2	93.0	83.5	90.3	93.8	80.8	88.1	94.2	95.5
3rd Grade Reading Proficiency	55.7	35.9	53.6	46.2	51.6	66.7	48.4	69.5	99.5
5th Grade Math Proficiency	46.4	38.7	37.2	29.9	43.2	57.1	42.9	78.5	99.2
6th Grade Not Chronically Absent	90.3	94.7	89.1	92.8	91.6	88.5	95.5	98.2	95.8
8th Grade Math Proficiency	48.3	29.9	25.3	37.2	48.0	34.5	56.0	80.3	98.2
9th Grade On Track to Graduate	73.5	80.6	70.1	68.6	73.5	78.1	65.7	94.6	95.5
9th Grade Not Chronically Absent	77.3	85.7	77.0	76.0	76.1	84.8	75.8	96.7	90.7
2011-12 Cohort Goals									
	Economically Disadvantaged	Limited English Proficient	Students with Disabilities	Black (Not of Hispanic origin)	Hispanic origin	American Indian / Alaska Native	Pacific Islander	Asian (Not included in Disadvantaged)	TAG (Not included in Disadvantaged)
4-Year Graduation Rate	70.5	59.9	52.1	68.6	64.9	61.4	74	81.3	92
5-Year Completion Rate									
3+ College Level Courses	19.6	13	11.8	14.4	21.4	15.1	12.3	40.7	65.1
Post-Secondary Enrollment	75.6	74.3	65.3	80.7	71.1	73.6	89.1	90.4	91.6
2014-15 Sub-group Goals									
	Economically Disadvantaged	Limited English Proficient	Students with Disabilities	Black (Not of Hispanic origin)	Hispanic origin	American Indian / Alaska Native	Pacific Islander	Asian (Not included in Disadvantaged)	TAG (Not included in Disadvantaged)
Kinder Assessment Participation	95	95	95	95	95	95	95	95	95
3rd Grade Reading Proficiency	100	100	100	100	100	100	100	100	100
5th Grade Math Proficiency	100	100	100	100	100	100	100	100	100
6th Grade Not Chronically Absent	91.3	95.2	90.2	93.5	92.4	89.7	96	98.4	96.2
8th Grade Math Proficiency	100	100	100	100	100	100	100	100	100
9th Grade On Track to Graduate	75.7	83.6	72.1	69.8	76.7	80	67.9	98.7	99.3
9th Grade Not Chronically Absent	74.2	87.1	79.3	78.4	78.5	86.3	78.2	97	91.6
2014-15 Cohort Goals									
	Economically Disadvantaged	Limited English Proficient	Students with Disabilities	Black (Not of Hispanic origin)	Hispanic origin	American Indian / Alaska Native	Pacific Islander	Asian (Not included in Disadvantaged)	TAG (Not included in Disadvantaged)
4-Year Graduation Rate									
5-Year Completion Rate									
3+ College Level Courses									
Post-Secondary Enrollment									

2017-18 Sub-group Goals									
	Economically Disadvantaged	Limited English Proficient	Students with Disabilities	Black (Not of Hispanic origin)	Hispanic origin	American Indian / Alaska Native	Pacific Islander	Asian (Not included in Disadvantaged)	TAG (Not included in Disadvantaged)
Kinder Assessment Participation									
3rd Grade Reading Proficiency									
5th Grade Math Proficiency									
6th Grade Not Chronically Absent									
8th Grade Math Proficiency									
9th Grade On Track to Graduate									
9th Grade Not Chronically Absent									

KEY for 20142-015 ACHIEVEMENT COMPACT
<i>Italics Bold = District provided goal</i>
Bold = ODE provided outcome
<i>Italics = District provided optional field</i>
NA = Not Available



Oregon Department of Education

John A. Kitzhaber, MD, Governor

Office of the Deputy Superintendent
255 Capitol St NE, Salem, OR 97310
Voice: 503-947-5600
Fax: 503-378-5156

October 22, 2014

Ruth Adkins
Co-Chair
Portland Public School Board
501 N Dixon St
Portland, OR 97227

Pam Knowles
Co-Chair
Portland Public School Board
501 N Dixon St
Portland, OR 97227

Dear Co-Chairs Adkins & Knowles:

I would like to respond to your Board's resolution submitted to ODE on August 19, 2014. As a former superintendent, I understand the complex work involved in the transition to higher standards and the policies you as a local board in charge of a major district have to consider. I greatly appreciate your leadership, your commitment to high standards, and all you and district staff do to support and improve student learning in Portland Public Schools.

I want to begin my response by addressing issues of accountability as they relate to students, teachers, and schools as there appears to be some confusion about how these results will impact our system. We are all committed to high expectations for our students and staff regardless of race, class, or zip code, and we must not shy away from accountability. While I believe we need a summative assessment system in our state, it is only one piece of the puzzle. Far more important is the high-quality instruction going on in our schools and the formative assessments teachers use to gauge student learning on a regular basis. We are moving into a transitional year as we complete the shift to new standards and implementation of a new assessment. During this first year of a new assessment, I do not believe it is appropriate for the results to impact teacher-level accountability through our educator evaluation process. Setting goals against a new assessment is simply too problematic. This is why we asked the US Department of Education for permission not to use Smarter Balanced results in educator evaluations for this first year. I am happy to announce the US Department of Education indicated they intend to grant states flexibility from using statewide summative assessment results in educator evaluations for 2014-2015.

We also need to be very thoughtful about how the results will be used for student-level accountability, particularly around demonstration of the Essential Skills. As we move to the new assessment, we must ensure there is no impact on students as it relates to demonstration of the Essential Skills and high school graduation. Students choosing to meet the Essential Skills requirement via the state test in 2014-15 and beyond (Smarter Balanced) will need to reach a

level of proficiency comparable to a 236 on OAKS. In 2014-15, high school seniors not passing OAKS as a junior will be allowed to take the old OAKS assessment to ensure they have an additional opportunity to demonstrate their Essential Skills requirement. Despite the rigor of the “meets” standard likely going up on the Smarter Balanced assessments, the level of achievement and expectation for students demonstrating proficiency in the Essential Skills will remain unchanged. Any anticipated variability or margin of error will be adjusted in the student’s favor.

For systems accountability purposes, I believe we need to continue to produce the school and district report cards. It is critical that we have a mechanism for comparing how our schools and districts are preparing students to meet these new higher standards. However, school ratings should not be hugely impacted by this change to a new assessment. Since our school rating system is based on the Oregon growth model, and the Oregon growth model is assessment agnostic, it is mathematically sound to rate the growth schools made for students by comparing their OAKS results from last year to their Smarter Balanced results next year. While we will see fewer students meeting the college and career-ready benchmark on the Smarter Balanced assessment, we will not see more schools rated as low achieving. We are working hard to communicate to communities and families that the drop in scores on Smarter Balanced is not a reflection on schools or on students but is simply a clearer, more honest look at where our students are on their path to college- and career-readiness.

There is value in schools receiving feedback on how they compare across their districts and the state as they work to improve student learning and outcomes. In addition to this inherent value, an annual school rating system is required by the US Department of Education. If Oregon suspended our school rating system, we would put our Title money in jeopardy and our federal flexibility waiver would likely be revoked. This would have significant implications on our schools as districts would need to spend up to \$51 million on private tutoring and bussing for students in schools deemed failing under No Child Left Behind (NCLB). Nearly all of our schools would be in “failing” status under NCLB, as are schools in other states without waivers such as Washington.

I would like to address a few points that should clear up some misconceptions present in sections F, G, and L of your resolution to provide the Board with additional context. You expressed some concerns over the quality of the new assessment. While no assessment is perfect, I strongly believe that the Smarter Balanced assessments are of much higher quality and will provide much better information on student learning than our previous OAKS assessments. The Smarter Balanced consortium has produced a product that is technically sound and meets the requirements for a high-quality assessment in terms of reliability, validity, and fairness. Their process has followed best practice for assessment development and continues to do so as we move into the achievement setting stage as well.

The Oregon Department of Education is committed to producing assessments that are accurate and fair for all students. Smarter Balanced has developed usability, accessibility, and accommodation features consistent with OAKS to ensure students have a positive and productive assessment experience which can produce fair and accurate estimates of each student’s achievement. As you are probably aware, ODE staff and Oregon educators have been involved in the test development every step of the way to ensure it meets our high expectations for quality

and accessibility and truly meets the needs of our students. In addition, key staff on the Smarter Balanced team came from Oregon, further strengthening the alignment between their system and our old OAKS system.

In response to the last element of the resolution directed at ODE regarding accessing production test items, this unfortunately, is not possible without creating a test security issue. However, a great deal of technical information on the new assessment can be found online at: <http://www.smarterbalanced.org/smarter-balanced-assessments/>. This information includes preliminary test blueprints, content specifications, item/task specifications, and sample questions. I believe your staff will find it very helpful in your further review of these assessments.

I am sure you will agree we must all promote a sense of urgency around this work and the desire to ensure we are fully preparing our young people for their futures. I think it is necessary to both give the assessment this coming year and to use the results to gauge our progress and adjust our efforts. I greatly appreciate your leadership and thoughtful concerns for the improvement of our education system. I hope you will continue to share your feedback, insights, and concerns with us as we move forward with the important work at hand.

While I know the current transition is challenging, I fully believe our efforts will result in better outcomes for our students. As you know, I have complete confidence that our students and schools can and will reach this new higher bar, and when they do, the impact on our state and on our student's futures, will be significant.

With gratitude for all that you do to support Portland students and their learning,



Rob S. Saxton
Deputy Superintendent of Public Instruction

cc: Carole Smith, Amanda Whalen



DR. NANCY GOLDEN
Chief Education Officer

October 27, 2014

Ruth Adkins
Co-Chair
Board of Education
Portland Public Schools
501 N Dixon Street
Portland, OR 97227

Pam Knowles
Co-Chair
Board of Education
Portland Public Schools
501 N Dixon Street
Portland, OR 97227

Carole Smith
Superintendent
Portland Public Schools
501 N Dixon Street
Portland, OR 97227

Dear Co-Chair Adkins and Knowles, and Superintendent Smith,

The Oregon Education Investment Board is in receipt of the school district Achievement Compact for the 2014-15 school year submitted by Portland Public Schools on October 15, 2014.

Pursuant to OAR 705-010-0060, I am writing to inform Portland Public Schools that the submitted Achievement Compact has not been accepted. The Achievement Compact submitted by the school district did not contain goals for students' 3rd grade reading proficiency, 5th grade math proficiency and 8th grade math proficiency, as required.

As Chief Education Officer, I am committed to working with you to resolve this issue, and am confident we can come to a solution.

The deadline for Portland Public Schools to submit the Achievement Compact, with required goals completed, is immediately following your next scheduled Board meeting.

Sincerely,

Nancy L. Golden
Chief Education Officer

cc: Amanda Whelan

BOARD OF EDUCATION
SCHOOL DISTRICT NO. 1J, MULTNOMAH COUNTY, OREGON

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November 10, 2014

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Personnel

The Superintendent RECOMMENDS adoption of the following items:

Numbers 4973 through 4982

RESOLUTION No. 4973

Election of Probationary Administrators (Full-time)

RECITAL

On the advice of the Chief Human Resources Officer, the Superintendent recommends that the administrator(s) listed below be elected as (a) Probationary Administrator(s).

RESOLUTION

The Board of Education accepts the Superintendent's recommendation, and by this resolution hereby elects as Probationary Administrator(s) for the school year 2014-15 the following person(s), subject to the employment terms and conditions set out in the standard form contract approved by legal counsel for the District and to be placed on the applicable Salary Guide that now exists or is hereafter amended:

Full-time

First	Last	ID
David	Allen	015078
Antony	Bertrand	016582
Robert	Cantwell	017792
Yolanda	Coleman	020463
Leah	Dickey	001045
Christopher	Frazier	014747
Maria	Gandarilla	023059
Kehaulani	Haupu	000862
Richard	Kirschmann Jr	008780
Britt	Kuether	017594
Shannon	McClure	021794
Anh	Nguyen-Johnson	013521
Samantha	Ragaisis	008107
Arturo	Ruelas	023068
Dawn	Schlegel	016741
Jonathan	Steinhoff	004942
Kathryn	Wagner-West	017706
Erika	Gillis	022906
Bradley	Hendershott	007348
Jorge	Meza	011862
Lenichtka	Reed	022983
Meisha	Geisler	023000
Drake	Shelton	015523
Dana	Nerenberg	023017
Alfredo	Quintero	023030
Kara	Mortimer	000071
Michael	Rowell	005376
Natasha	Butler	001024
William	Cohen	022014

RESOLUTION No. 4974

Election of Temporary Administrators

RECITAL

The following person(s) have {has} served or will serve in administrative positions with the District, and the Superintendent recommends them to the Board of Education ("Board") for election as Temporary Administrators.

RESOLUTION

The Board accepts the Superintendent's recommendation and by this resolution hereby elects as Temporary Administrators for the school year 2013-14 the following person(s), according to the employment terms and conditions set out in the standard District contract, with all to be placed on the applicable Salary Guide that now exists or is hereafter amended:

First	Last	ID
Tonya	Mjelde	014626
Mary	Patterson	007700

S. Murray

RESOLUTION No. 4975

Election of Contract Teacher

RECITAL

On the advice of the Chief Human Resources Officer, the Superintendent recommends that the teacher listed below who has been employed by the District as a regularly appointed teacher for three or more successive school years be elected as a Contract Teacher.

RESOLUTION

The Board of Education accepts the Superintendent's recommendation, and by this resolution hereby elects as a Contract Teacher for the school year 2014-15 the following person:

First	Last	ID
Daniel	Aaker	020057

S. Murray

RESOLUTION No. 4976

Election of Third-year Probationary Teacher (Full-time)

RECITAL

On the advice of the Chief Human Resources Officer, the Superintendent recommends that the teacher listed below be elected as Third-year Probationary Teacher.

RESOLUTION

The Board of Education accepts the Superintendent's recommendation, and by this resolution hereby elects as Third-year Probationary Teacher for the school year 2014-15 the following person, subject to the employment terms and conditions set out in the standard form contract approved by legal counsel for the District and with all to be placed on the applicable Salary Guide that now exists or is hereafter amended:

Full-Time

First	Last	ID
Irene	Petersen	015110

S. Murray

RESOLUTION No. 4977

Election of Third-year Probationary Teacher (Part-time)

RECITAL

On the advice of the Chief Human Resources Officer, the Superintendent recommends that the teacher listed below be elected as Third-year Probationary Teacher.

RESOLUTION

The Board of Education accepts the Superintendent's recommendation, and by this resolution hereby elects as Third-year Probationary Teacher for the school year 2014-15 the following person, subject to the employment terms and conditions set out in the standard form contract approved by legal counsel for the District and with all to be placed on the applicable Salary Guide that now exists or is hereafter amended:

Part-Time

First	Last	ID
Phillip	Lancaster	021123

S. Murray

RESOLUTION No. 4978

Election of Second-year Probationary Teacher(s) (Full-time)

RECITAL

On the advice of the Chief Human Resources Officer, the Superintendent recommends that the teacher(s) listed below be elected as Second-year Probationary Teacher(s).

RESOLUTION

The Board of Education accepts the Superintendent's recommendation, and by this resolution hereby elects as Second-year Probationary Teacher(s) for the school year 2014-15 the following person(s), subject to the employment terms and conditions set out in the standard form contract approved by legal counsel for the District and with all to be placed on the applicable Salary Guide that now exists or is hereafter amended:

Full-Time

First	Last	ID
William	Chasse	022333
Aaron	Finley	016888
Maria	Haddox	018816
Katie	Leveille	021976
Donna	Robles	022083
Bryndle	Rueck	022309

S. Murray

RESOLUTION No. 4979

Election of Second-year Probationary Teacher(s) (Part-time)

RECITAL

On the advice of the Chief Human Resources Officer, the Superintendent recommends that the teacher(s) listed below be elected as Second-year Probationary Teacher(s).

RESOLUTION

The Board of Education accepts the Superintendent's recommendation, and by this resolution hereby elects as Second-year Probationary Teacher(s) for the school year 2014-15 the following person(s), subject to the employment terms and conditions set out in the standard form contract approved by legal counsel for the District and with all to be placed on the applicable Salary Guide that now exists or is hereafter amended:

Part-Time

First	Last	ID
Daniel	Brixius	004461
Jacob	Hockett	021948
Alicia	Irwin	022089
Erika	Johnson	019750
Emily	Lethlean	016962
Hong	Liu	015156
Heidi	Masunaga	005454
Jennifer	McKnight	014368
Jerrie	Perkins	018847
Michael	Pham	000886

S. Murray

RESOLUTION No. 4980

Election of First-year Probationary Teachers (Full-time)

RECITAL

On the advice of the Chief Human Resources Officer, the Superintendent recommends that the teacher(s) listed below be elected as a First-year Probationary Teacher(s).

RESOLUTION

The Board of Education accepts the Superintendent's recommendation, and by this resolution hereby elects as First-year Probationary Teacher(s) for the school year 2014-15 the following person(s), subject to the employment terms and conditions set out in the standard form contract approved by legal counsel for the District and to be placed on the applicable Salary Guide that now exists or is hereafter amended:

Full-time

First	Last	ID
Tivon	Abel	012199
Jessica	Acosta	022794
Meredith	Addy	023100
Noelle	Allen	009246
Vanessa	Alvarez	023120
Kimberly	Amador	023165
Berenice	Amaya-Gonzalez	023218
Mary	Anderson	023274
Rosario	Arellano	023318
Lyndsey	Arnold	023402
Camila	Arze Torres Goitia	023061
Kristin	Aubel Topletz	023129
Gina	Azzaro- Budak	021295
Carlos	Baca	023350
Carolyn	Barnes	023085
Heather	Barnwell	023167
Sean	Barry	023392
Sarah	Batten	023286
Nathan	Beck	022970
Sanjay	Bedi	023116
Neressa	Bennett	023194
Jacqueline	Blodgett	023143
Tammy	Blumhardt- Braga	023315
Rebecca	Bourassa	023299
Timothy	Bowman	023110

Megan	Boyeas	022107
Amber	Brown	018158
Anjene	Bryant	023437
Alexander	Buckner	020343
Rosario	Burke	017155
Christine	Busacca	023261
Angela	Bustamante- Jenkins	023255
Gabrielle	Buvinger- Wild	023083
Robert	Calica	023080
Matthew	Campeau	010939
Brittney	Caraboa	023212
Duncan	Carranza	023119
Brian	Cates	023158
Richard	Childress	022967
Garett	Chong	022982
Paula	Chudd	017217
Lisa	Clark	023260
Frances	Clawson	022701
Chelsea	Clyde	023269
Cara	Colclasure	022979
Jacqueline	Crawford	023355
Gladis	Da Rosa	020212
Roxanne	Davidson	014686
Jennifer	de Boer	022955
Nicole	De Lagrave	023279
Maria	De Valdenebro	022989
Sada	Dewey	023244
Yulia	Deych	023056
Shelby	Dietsch	023266
Morgan	Dill	023103
Elizabeth	Docken	023307
Deborah	Dombrowski	023067
Stephanie	Doney	023216
Kaitlyn	Duffy	022144
Lori Ann	Duggan	022330
Sarah	Dulcich	023130
Kelly	Dwight	023106
Brian	Dyer	023092
Katharine	Eichman	020808
Nicholas	Erickson	023369

Roma	Estandian	023323
Kian	Fatemi	023196
Ian	Feldt	023340
Erin	Fell	023273
Joseph	Ferguson	023214
Laura	Fisher	023267
Melody	Flores	023348
Melissa	Forst	023450
Eric	Fraser	023205
Levia	Friedman	023122
Ritsuko	Fujiwara	017147
Nichole	Gaither Martin	000102
Alyssa	Gardner	022150
Susan	Gaudreau	018700
Brian	Gerber	019970
Asa	Gervich	022978
Stephanie	Gibner	023237
Jason	Giles	023373
Mary	Giuliano	023064
Melissa	Gonzalez	023104
Sarah	Graham- Baker	023178
Rhonda	Gray	023057
Alicia	Groseclose Lobb	023031
Danuta	Guest	023226
Marquita	Guzman	013342
Kathleen	Hart	023095
Athanasia	Hatzipavlou	017049
Amy	Hayes	023141
Stephanie	Haynes	021335
Christopher	Healey	023360
James	Heath	023389
Jamie	Hemstead	023192
Lauren	Herrmann	018785
Logan	Heyerly	023082
Lindsey	Hibbert	023101
Mary	Hill	008740
Kevin	Hilyard	022140
Julia	Himmelstein	020809
Tammy	Hite	012807
Cuong	Hoang	023230

Rebecca	Hoffenberg	023182
Ryan	Hook	023470
Jamie	Horner	023121
Mary	Houghton	023371
Kimberly	Hoy	008953
Ian	Huntley	023102
Jamie	Incorvia	023070
Joel	Jablon	021487
Tara	Jardine	023390
Erica	Jones	023435
Jessica	Jones	023624
Carrie	Jones Bohara	022976
David	Kennedy	021156
Nam Kirn	Khalsa	020607
Benjamin	Kiggen	023091
Meghan	Kincaid	023134
Megan	Kindred	023159
Annette	Kloeppe	023215
Zachary	Korth	023317
Cameron	Kreuz	023280
Ashley	LaBerge	023148
Renee	Laney	023190
Bradley	Langton	021441
Eric	Lanners	023163
Andrea	Lawrence	023088
Tracy	Lawrence	023300
Thuy-Linh	Le	022934
Amanda	LeCrone	023112
Sang	Lee	023062
Sarah	Lee	023297
Melinda	Lepore	023081
Matthew	Lewis	023251
Kitts	Liegner	023416
Samantha	Lloyd	023543
Monica	Loosemore	023003
Emilee	Lumbard	023123
Yudmila	Machado Rodriguez	023114
Eliana	Machuca	020509
Marlena	Maestas	013880
Lauren	Magee	023326

Terry	Marchyok	000230
Joseph	Martin	020725
Nicole	Masters	023058
Frank	Mathews	023339
Stephanie	McClain	022996
Brian	McFadden	023245
James	McGee	023232
Seth	McGinnis	023282
Maya	McGowan	021289
Wendy	McHarris	022894
Erin	McKee	022974
Hilary	McKinney-Heiney	022115
Marie	McMahon	023238
Joyce	McShane	022080
Jesse	Merz	023206
John	Metz	007674
Benjamin	Mihelic	023176
Lisa	Mizee	020534
Joceline	Moffitt	023314
Desiree	Montoya	023173
Emily	Nemesi	023186
Thomas	Niebergall	022999
Megan	Niemitz	022952
Nicholas	Nohner	023231
Amy	Odom-Braun	023337
Colleen	O'Leary	023191
Maggie	Ordaz	023195
Colin	Oriard	023117
Daniel	Patterson	020865
Ruth	Payne	023253
Gary	Pearlz	023084
Megan	Peck	023109
Brian	Penland	023313
Susan	Peters	023133
Nathan	Pier	018008
Nancy	Pierce	023217
Gabriela	Pinder	023374
Clair	Pople	023413
Ian	Propst-Campbell	022942
Kun	Qian	023229

Gabrielle	Quintana	023306
Alix	Reynolds	022841
Emanuela	Reznic	023108
Kevin	Richardson	023240
Noelle	Richey	022923
Mark	Richner	023346
Zachary	Rodecap	023243
Kate	Rodriguez	023396
Ashley	Rollins	022953
Joseph	Rowe	015288
Myron	Ryan	007130
Brian	Samore	008124
Markelle	Sams	023322
Emily	Sanborn	023089
Charles	Sanderson	023078
Jane	Schaffer	017128
Thomas	Schnebeck	022706
Gerald	Scrutchions	023020
Allyson	Sievers	018926
Ana	Simantel	000671
Erich	Simon	023179
Elizabeth	Skorohodov	019092
Christopher	Smith	023151
Jennifer	Smith	023254
Stuart	Smith	023283
Nicolette	Smith	015940
Joseph	Sneed	023325
Kara	Soulas	023066
Suella	Springfield	022070
Dylan	Stafford	023032
Jamie	Suehiro	023060
David	Suhrbur	023290
Jeremy	Sutter	023276
Frank	Talerico	023524
Tracie	Talerico	023417
Aaron	Tanabe	023125
Adam	Taylor	023132
George	Ten Eyck	021973
Shaphan	Thomas	023124
Amy	Tilt	020682
Cami	Touloukian	023448

Madelyn	Troiano	022954
April	Truhlar	022943
Cezanne	Tyner	017255
Laura	Valent	014695
Allen	Van de Water	023128
Sara	Van Egeren	023111
Kelda	Van Patten	022968
Amy	Vaughan	023366
Lyubov	Volsky	023456
Kimberly	Wagner	023137
Mary	Wagner	023298
Keyi	Wang	023331
Christopher	Watson	023221
Ellen	Weeks	023334
Willow	Weir-Mayorga	023127
Victoria	West	019010
Rhonda	Wheeler	023262
Jack	Wilkinson	022987
Brian	Williams	023311
Joshua	Wolfe	023329
MaLynda	Wolfer	016164
Beyoung	Yu	023027
Eleanor	Zardinejad	023198

S. Murray

RESOLUTION No. 4981

Election of First-year Probationary Teachers (Part-time)

RECITAL

On the advice of the Chief Human Resources Officer, the Superintendent recommends that the teacher(s) listed below be elected as First-year Probationary Teacher(s).

RESOLUTION

The Board of Education accepts the Superintendent's recommendation, and by this resolution hereby elects as First-year Probationary Teacher(s) for the school year 2014-15 the following person(s), subject to the employment terms and conditions set out in the standard form contract approved by legal counsel for the District and with all to be placed on the applicable Salary Guide that now exists or is hereafter amended:

Part-Time

First	Last	ID
Madeleine	Allen	021204
Candace	Anderson	023294
Andrew	Baird	023105
Anna	Bernardo	017243
Allison	Bernat	019163
Daniel	Blumhardt	023361
Jonathan	Buford	023228
Andres	Canales Reyes	014719
Allyson	Copacino	014678
Kendall	Cunningham- Parmeter	012310
Christina	Curran	023347
Michael	Diltz	023242
James	Duckworth	023181
Alexandra	Fagan	023432
John	Fessant	023248
Jason	Fitch	014744
Erin	Fitzpatrick-Bjorn	023174
Merri	Garcia	000276
Stephen	Gardiner	019320
Molly	Garvey	005614
Maya	Gascoyne	023185
Mark	Gerolami	023193
Sara	Goldman	021263
Jessica	Gretzinger	023077
Mitchell	Gustin	023336
Joel	Hanawalt	020011
Elizabeth	Harvey	023293

Andrew	Hernandez	023614
Keri	Higginbottom	011099
Anna	Jablonski	023453
Scott	Johnston	023258
Kira	Jones	023155
Molly	Kangas	022990
Joshua	Kessluk	019285
Lindsay	King	023079
Valoree	Lancaster	023256
Ethan	Law	023330
Myngoc	Le	019680
Elizabeth	LeeWehage	023312
Sarah	LeMier	019137
Richard	Littledyke	023203
Erika	Luther	023327
Marian	Macrae Herrmann	023219
Sara	Martins	023393
Keelin	Mayer	023152
Ellen	McCarthy	023197
Christopher	McConnell	023252
Heather	McDaid	023349
Samuel	McKinstry	020177
Stephanie	McMillan	023405
Natalie	Mew	013643
Kathryn	Mouery	020810
Zulema	Naegele	023236
Sonya	Nelson	023295
Elaine	Newton-Bruzza	023172
Gavriel	Patterson de Tarr	021914
Daniel	Polzin	021437
Emily	Pratt	023414
Nicole	Reed	023204
Paul	Rizzo	023140
Susan	Robertson	022226
Laura	Ross	023284
Kasandra	Roth	022988
Erik	Seavey	022980
Sherron	Selter	023514
Melody	Simrell	006287
Jennifer	Sollman	022443
Jasmine	Spiegel	023136

Katelyn	Staszkw	023324
Patrick	Stenger	023335
Douglas	Sutton	023028
Adria	Tarango	023316
Kari	Taylor	023087
Catherine	Therault	002545
Matt	Thompson	023241
David	Top	023308
Peter	Towson	023090
Vicky	Vasey	020918
Renee	Vineyard Stahl	010900
Rochelle	Von Ahn	023440
Sonia	Warfel	023394
Toni	WeaverLi	014010
Cathy	Wentworth	023184
Frank	Winicki	021631
Emily	Winokur	017271
Lynn	Yarne	023387

S. Murray

RESOLUTION No. 4982

Appointment of Temporary Teachers and Notice of Non-renewal

RESOLUTION

The Board of Education accepts the recommendation to designate the following persons as temporary teachers for the term listed below. These temporary contracts will not be renewed beyond their respective termination dates because the assignments are temporary and District does not require the teachers' services beyond completion of their respective temporary assignments.

First	Last	ID	Eff. Date	Term Date
Marni	Afryl	015818	10/2/2014	6/15/2015
Kathryn	Bailey	022096	9/2/2014	6/15/2015
Cory	Bettinger	020031	8/26/2014	6/15/2015
Maureen	Bossard	022969	8/16/2014	6/15/2015
Janelle	Boyle	022265	9/12/2014	6/15/2015
Amanda	Carrigg	020678	8/16/2014	6/15/2015
Colin	Costantino	023275	8/16/2014	6/15/2015
Janet	Dakin	004571	10/6/2014	6/15/2015
Raymond	Denney	023375	8/29/2014	6/15/2015
Pamela	Dixon	002552	9/2/2014	6/15/2015
Andrea	Dole Church	022043	9/19/2014	6/15/2015
James	Doyle	018495	8/16/2014	6/15/2015
Catherine	Eastman	022418	8/16/2014	6/15/2015
Sarah	Flores	022547	8/16/2014	6/15/2015
Salvatore	Frisina	020838	8/16/2014	6/15/2015
Kathleen	Fuller	023154	8/16/2014	6/15/2015
Liliana	Greenberg	023419	8/26/2014	6/15/2015
Susan	Gregoire	023481	9/15/2014	6/15/2015
Michael	Harmon	022336	9/22/2014	6/15/2015
Leah	Harmon	023516	9/18/2014	6/15/2015
Christopher	James	023094	8/25/2014	6/19/2015
Kimberly	Jarvis	020017	8/28/2014	12/20/2014
Aimee	Jo	023546	9/26/2014	6/15/2015
Emily	Kinney	023344	8/16/2014	6/15/2015
Maia	Kirkelie	022385	9/5/2014	6/15/2015
Anne	Lee	023289	8/16/2014	6/15/2015
Marcia	McCubbin	015760	9/9/2014	12/8/2014
Cynthia	Medina	022944	8/16/2014	6/15/2015
Kesia	Micheletti	023115	8/16/2014	6/15/2015
Kelly	Nichols	023160	8/16/2014	6/15/2015
Pamela	Pastoret	003643	9/8/2014	6/15/2015
Robert	Peterson	023622	9/29/2014	12/19/2014
Ismael	Relampagos	007346	9/30/2014	6/15/2015
Erewyn	Remington	023376	9/2/2014	6/15/2015
Lindsay	Roots	023328	8/28/2014	6/15/2015
Anita	Schmuecker	023310	8/16/2014	6/15/2015
Aron	Steinke	023156	8/16/2014	6/15/2015

Matthew	Strube	013710	8/16/2014	6/15/2015
Jody	Swan	021179	8/16/2014	6/15/2015
Trevor	Todd	023281	8/16/2014	6/15/2015
Elizabeth	Tripp	023016	8/16/2014	6/15/2015
Meghan	Turrill Powers	023547	9/24/2014	6/19/2015
Samantha	Vestal	023333	8/28/2014	6/15/2015
Amy	White	014147	9/11/2014	6/15/2015
Steven	White	018758	8/26/2014	6/15/2015
Todd	Williams	023415	9/3/2014	6/15/2015
Emma	Wood	022149	8/16/2014	6/15/2015
Man	Xiang	022027	8/16/2014	6/15/2015
Theresa	Yoshiwara	007328	9/10/2014	12/12/2014
Darlene	Zimbardi	022374	9/16/2014	12/1/2014

S. Murray

Purchases, Bids, Contracts

The Superintendent RECOMMENDS adoption of the following items:

Numbers 4983 and 4984

RESOLUTION No. 4983

Revenue Contracts that Exceed \$25,000 Limit for Delegation of Authority

RECITAL

Portland Public Schools (“District”) Public Contracting Rules PPS-45-0200 (“Authority to Approve District Contracts; Delegation of Authority to Superintendent”) requires the Board of Education (“Board”) to enter into and approve all contracts, except as otherwise expressly authorized. Contracts exceeding \$25,000 per contractor are listed below.

RESOLUTION

The Superintendent recommends that the Board approve these contracts. The Board accepts this recommendation and by this resolution authorizes the Deputy Clerk to enter into agreements in a form approved by General Counsel for the District.

NEW REVENUE CONTRACTS

No New Revenue Contracts

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

Contractor	Contract Term	Contract Type	Description of Services	Contract Amount	Responsible Administrator, Funding Source
City of Portland	7/1/2014 through 6/30/2017	Intergovernmental Agreement/Revenue IGA/R 61245	Portland Children’s Levy grant to support extended-day Head Start classrooms at Creative Science Center, Creston Annex and Kelly Center.	\$820,000	D. Berry Fund 205 Grant G1430
Reynolds School District	7/1/2014 through 6/30/2015	Intergovernmental Agreement/Revenue IGA/R 61257	Columbia Regional Programs provides school-age classroom services for regionally eligible deaf/hard of hearing students.	\$353,625	L. McConachie Fund 299 Dept. 5422 Grant S0031
InterMountain Education Service District	10/1/2014 through 6/15/2015	Intergovernmental Agreement/Revenue IGA/R 61307	Columbia Regional Programs provides licensed staff to deliver coaching and consultation to visually impaired students.	\$25,000	L. McConachie Fund 205 Dept. 5409 Grant G1341

AMENDMENTS TO EXISTING REVENUE CONTRACTS

Contractor	Contract Amendment Term	Contract Type	Description of Services	Amendment Amount, Contract Total	Responsible Administrator, Funding Source
Department of Human Services	9/24/2014 through 9/1/2016	Intergovernmental Agreement/Revenue IGA/R 58988 Amendment 3	DHS reimburses District for student foster care transportation costs.	\$69,770 \$324,770	T. Brady Fund 205 Dept. 9999 Grant G1234
State of Oregon	9/2/2014 through 6/30/2015	Intergovernmental Agreement/Revenue IGA/R 60136 Amendment 3	Funds to provide child care for children of students in ODE’s Teen Parent Targeted Populations Subsidy Program at Roosevelt and Madison.	\$63,000 \$147,000	C. James Fund 205 Dept. 9999 Grant G1377
City of Portland	7/1/2014 through 06/30/2015	Intergovernmental Agreement/ Revenue IGA/R 59656 Amendment 1	Ongoing partnerships for funds from the Arts Education and Access Income Tax.	\$4,750,000	D. Wynde Fund 191 Dept. 9999 Grant H0200

Y. Awwad

RESOLUTION No. 4984

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

RECITAL

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

RESOLUTION

The Superintendent recommends that the Board approve these contracts. The Board accepts this recommendation and by this resolution authorizes the Deputy Clerk to enter into agreements in a form approved by General Counsel for the District.

NEW CONTRACTS

Contractor	Contract Term	Contract Type	Description of Services	Contract Amount	Responsible Administrator, Funding Source
Oracle USA	12/16/2014 through 12/15/2015	Purchase Order PO 122475	PeopleSoft Enterprise annual licensing, maintenance, and technical support.	\$412,694	J. Klein Fund 101 Dept. 5581
Re:think Tutoring	9/2/2014 through 8/29/2015	Personal Services PS 61235	Provide Title I tutoring services in math and literacy at 10 private and alternative schools. RFP 2014-1764	\$201,808	J. LaFontaine Fund 205 Depts. 5407, 6913, 6945, 6908, 6906, 6989, 6947, 6928, 6985, 6944 & 6942 Grant G1411
Playworks	8/28/2014 through 6/30/2015	Personal Services PS 61244	Provide recess and after-school student management and behavior supports on school days between 7:00 AM and 6:00 PM. RFP 2010-1296	\$352,000	J. LaFontaine Funds 101 & 205 Depts. 1140, 1141, 1150, 1178, 1255, 1258, 1262, 1264, 1266, 1268, 1276, 1286 & 1294 Grants G1446, G1410, G1340 & G1349
Education Northwest	8/1/2014 through 7/31/2015	Personal Services PS 61308	Provide support to principals and school teams for the development and implementation of comprehensive achievement plans at Boise-Eliot/Humboldt, Roosevelt, George, James John, Kelly, and Harrison Park.	\$265,700	J. LaFontaine Fund 205 Dept. 5407 Grant G1411
Center for Intercultural Organizing	11/1/2014 through 9/24/2021	Personal Services PS 61312	Create infrastructure for GEAR UP – Mobilizing for College. Develop and implement Building Undergraduates through Inclusive Leadership Development (BUILD) Program.	\$1,730,000	A. Nusom Fund 205 Dept. 5428 Grant G1455

Serendipity Center, Inc.	9/1/2014 through 6/30/2015	Personal Services PS 61238	Provide a program of instruction within the requirements of the Oregon Department of Education as a private alternative school to designated students.	\$209,070	M. Pearson Fund 101 Dept. 5414
Immigrant & Refugee Community Organization	11/17/2014 through 11/30/2016	Personal Services PS 61XXX	Provide American Sign Language, oral and telephone interpretation services and written translation services on an as needed basis. RFP 2014-1814	\$150,000	W. Poinsette Fund 101 Dept. 5489
Passport to Languages	11/17/2014 through 11/30/2016	Personal Services PS 61XXX	Provide American Sign Language, oral and telephone interpretation services and written translation services on an as needed basis. RFP 2014-1814	\$150,000	W. Poinsette Fund 101 Dept. 5489

NEW INTERGOVERNMENTAL AGREEMENTS (“IGAs”)

Contractor	Contract Term	Contract Type	Description of Services	Contract Amount	Responsible Administrator, Funding Source
Multnomah Education Service District	7/1/2014 through 6/30/2015	Intergovernmental Agreement IGA 61301	Provide 1.8 FTE registered nurses services for PPS Head Start program.	\$179,947	D. Berry Funds 205 & 299 Depts. 6303 & 4997 Grants G1430, G1426, G1427 & S0261
Reynolds School District	7/1/2014 through 6/30/2015	Intergovernmental Agreement IGA 61260	Provide 1.61 FTE Autism specialists for students eligible for low incidence Autism services.	\$201,600	L. McConachie Fund 205 Dept. 5433 Grant G1342
David Douglas School District – Multnomah Early Childhood Program	7/1/2014 through 6/30/2015	Intergovernmental Agreement IGA 61261	Provide 1.22 FTE Autism specialists for students eligible for low incidence Autism services.	\$212,000	L. McConachie Fund 205 Dept. 5433 Grant G1342
Portland State University	11/1/2014 through 9/24/2021	Intergovernmental Agreement IGA 61XXX	Provide supports to GEAR UP Mobilizing for College including annual fellowships for up to 20 teachers and annual summer programs for up to 50 students.	\$566,600	A. Nusom Fund 205 Dept. 5428 Grant G1455

AMENDMENTS TO EXISTING CONTRACTS

No New Amendments

Y. Awwad

Other Items Requiring Board Action

The Superintendent RECOMMENDS adoption of the following items:

Numbers 4985 through 4987

RESOLUTION No. 4985

Resolution to Adopt Revised Complaint Policy 4.50.030-P and
Revocation of the Citizen Complaint Policy 7.20.030.

RECITALS

- A. The Board directed staff to revise the District's Complaint Policy in order to provide a more accessible and transparent complaint resolution process that would also be in compliance with state law.
- B. On September 23, 2014, staff presented the first reading to the Board of the revised Complaint Policy and the draft Administrative Directive. Per District Policy, the public comment period was open for 21 days.

RESOLUTION

- 1. The Board of Education hereby adopts the revised Complaint Policy, Policy 4.50.030-P, and revokes Policy 7.20.030.
- 2. The Board will receive a report on the implementation of the revised policy within one year of the adoption.

J. Patterson

RESOLUTION No. 4986

Resolution to Amend Portland Public Schools Achievement Compact Targets

RECITALS

- A. In February 2012, the Legislature directed all K-12 districts to enter into annual achievement compacts with the Oregon Education Investment Board (OEIB) in order to focus funding and strategies at the state and local level on the achievement of the statewide education goals.
- B. As part of the achievement compacts, each district is required to set targets on a number of indicators every year.
- C. The Achievement Compact Advisory Committee, made up of teachers, principals, community members, and central office staff, created a methodology and made recommendations to the Board for setting achievement compact targets.
- D. For the Achievement Compacts, Portland Public Schools has set ambitious targets for all indicators that reflect our belief that 100% of PPS students can meet each target, our commitment to the State's 40-40-20 goal and our urgency to close the achievement gap for our historically underserved students.
- E. We also recognize that in order to meet these ambitious targets, there needs to be a greater investment in K-12 education. For the 2013-15 biennium, the state legislature funding appropriation into State School Fund is only 75% of the amount required to fund the Quality Education Model.
- F. Three of the indicators on the Achievement Compact have been based on the Oregon Assessment for Skills and Knowledge (OAKS): 3rd grade reading, 5th grade math and 8th grade math. For the 2014-15 school year, the Smarter Balanced Assessment (SBA) will replace the OAKS test.
- G. In July, 2014 the Board unanimously passed resolution 4943 on the implementation of the Smarter Balanced Assessment. In that resolution, the Board requested that the "State not use the Smarter Balanced Assessment for punitive labeling or sanctioning of students, teachers, schools or districts. There must be assurances on the reliability and validity of the assessment. Use of an unreliable or invalid Smarter Balanced Assessment could undermine student enthusiasm for learning, could create devastating outcomes for schools, and could set schools and communities back years if not managed well at the state and local levels."
- H. The Board also called upon the "State to establish a transitional or pilot status for the Smarter Balanced Assessment starting with its initial implementation in 2015, to provide sufficient time to ensure the reliability of the test, to provide additional teacher professional development, and to provide students and families the opportunity to understand and learn from the results of the new assessment without the high-stakes consequences that may have the unintended outcome of undermining student success."
- I. In October 2014, the Board declined to set targets for the 3rd grade reading, 5th grade math and 8th grade math indicators (the three metrics that would employ the Smarter Balanced Assessment) in order to use 2014-15 data for baseline data and until the District receives assurances that the assessment is reliable, valid and free from cultural, linguistic, and socioeconomic bias.
- J. On October 27, 2014 Chief Education Officer Golden informed Portland Public Schools that the Achievement Compact had not been accepted and that targets needed to be set for each metric.

RESOLUTION

1. The Board of Education adopts the attached Achievement Compact and its targets for the 2014-15 school year.

A. Whalen

RESOLUTION No. 4987

Appointment of Citizen Budget Review Committee Members

RECITALS

- A. The mission of the Citizen Budget Review Committee (CBRC) is to review, evaluate, and make 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 receives its charge from the Board.
- B. In May 2011, the voters of the Portland Public School (PPS) District passed a Local Option Levy, Measure 26-122 which mandates independent citizen oversight to ensure tax dollars are used for purposes approved by local voters. [In the recent (November 4, 2014) election the voters of the Portland Public School (PPS) District passed a new Local Option Levy, Measure 26-161, which is effective in 2015, which also mandates independent citizen oversight to ensure tax dollars are used for purposes approved by local voters].
- C. The CBRC is composed of eight to twelve volunteer members. The Board appoints members to two-year terms with a student member appointed to a one-year term.
- D. The Board recognizes that District employees and community members bring specialized knowledge and expertise to the CBRC and budgetary review process. The Board instructs all CBRC members to employ discretion, avoid conflicts of interest or any appearance of impropriety, and exercise care in performing their duties.
- E. Eight members of the committee are midway through their two-year term: Raihana Ansary, Roger Kirchner, Scott McClain, Inger McDowell, Rita Moore, Harmony Quiroz, Betsy Salter, Patrick Stupfel were appointed last year to serve through June 30, 2015.
- F. The District received applications from two previous members (Dick Cherry and Tom Fuller) indicating interest in serving an additional term, one application from a PPS parent who had not served previously and one student nominated via the superintendent's student advisory committee, Supersac.
- G. Applications have been reviewed and the Superintendent recommends the Board appoint Dick Cherry, Tom Fuller and Eilidh Lowery as members for two years and Claire Mersereau as student representative.

RESOLUTION

- 1. Dick Cherry, Tom Fuller and Eilidh Lowery are hereby appointed as members of the CBRC for a two-year term through June 30, 2016.
- 2. Claire Mersereau is hereby appointed as the student member of the Citizen Budget Review Committee serving through June 30, 2015.
- 3. The Board hereby identifies the CBRC as the independent citizen oversight body to ensure tax dollars are used for purposes approved by local voters when they passed a Local Option Levy, Measure 26-122, in May 2011, and requests the CBRC to provide a report in this regard in addition to its report on the superintendent's proposed budget for 2015/16.

Y. Awwad / D. Wynde