

BOARD OF EDUCATION

Portland Public Schools
STUDY SESSION
January 6, 2015

Board Auditorium

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

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

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

This meeting may be taped and televised by the media.

AGENDA

1. **PUBLIC COMMENT** 6:00 pm
2. **UPDATE: SPECIAL EDUCATION** 6:20 pm
3. **UPDATE: SCHOOL CLIMATE COMMITTEE** 7:45 pm
4. **SECOND READING: CASH MANAGEMENT POLICY** 8:15 pm
action item
5. **FIRST READING: CAFETERIA PLAN AMENDMENT** 8:30 pm
6. **DIVISION 22 REPORT** 8:50 pm
7. **BUSINESS AGENDA** 9:05 pm
8. **ADJOURN** 9:15 pm

Portland Public Schools Nondiscrimination Statement

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



Board of Education Informational Report

MEMORANDUM

Date: January 6, 2015

To: Members of the Board of Education

From: Mary Pearson- Director of Special Education

Subject: The PPS Special Education Department's Short and Long Term Plan

This Memorandum provides an overview of the PPS Special Education Department's vision and 6 year strategic plan. This short and long term strategic plan, aptly named Reach 2020, aligns with the fundamentals of the Successful Schools Framework and keeps equity in the center of all of our work.

The content of our presentation will cover the entire range of special education services from our early childhood programs to our transition services for our 18-21 year old student population. Included as part of this presentation, and for your reference, are the following documents:

1. Reach 2020 Presentation – PPT we used for our Community Forums and Stakeholder Discussion Groups
2. Budget Breakdown
3. National Association of School Psychologists (NASP) Service Delivery Model Brochure
4. NASP National Newsletter- PPS School Psychologist Recognition
5. Assessment's purchased for School Psychologists and teachers as agreed upon in PAT negotiations
6. Scoring software purchased as agreed upon in PAT negotiations
7. Regional Support Teams Structure
8. Reflective Practice Form

PPS Special Education Department Short and Long Term Plan

2014-2020

Special Education Services Mission

PPS is committed to reversing the trend of isolation and segregation of students with disabilities by ensuring all students have access to high quality instruction responsive to their needs and delivered by effective and culturally responsive educators within the Least Restrictive Environment.

Our primary focus is to build capacity and to support staff members district wide to ensure effective instruction is the predictor of student outcomes.



Who are we?

- Central office- direct support to school staff, and supervision of staff 170 staff: motor team, feeding team, assistive tech, school psychologists, TOSA's, autism team, early childhood, para trainers/floaters, Multiple Pathways staff
- 3 special programs: Pioneer k-8, Pioneer High School and Community Transition Program (18-21)
- Approximately 6900 students in 81 schools, CBO's, charters, private schools and special programs

Status quo is not enough...

- 53%- 3rd grade students with disabilities meet benchmark in ELA (State target is 69%)
- Black students with disabilities- 5 times more likely to be excluded from school for more than 10 days in a school year
- 71% -Students with disabilities presented at Intervention Resource Team (IRT) were students of color
- 25% - behavior classrooms are Black (Black students are 10.7% of our PPS student population)
- Less than 6% of students exit our behavior programs per year
- 4 year graduation rate for students with disabilities is 31% (State target is 67%)
- 5 year graduation rate for students with disabilities is 36.7% (State target is 72%)

Influences...

- Federal
 - New federal ruling-shift from compliance to achievement
- State
 - Key targets and achievement compacts
- <https://www.youtube.com/watch?v=PE5-jpFhcFA&feature=youtu.be&safe=active>

Big Picture Alignment- Reach 2020



Early Childhood Education



- Developmental assessments for all children from birth to age five who have or are suspected of having a disability requiring specially designed instruction
- Complete approximately 1200 evaluations per year at eval center, remote sites, and in homes
- ECTT - targeted supports for 400+ incoming kindergarten students with disabilities; working toward a seamless process from EC to K; focusing on child/family strengths and assets, incl. cultures, languages, abilities
- Collaborating with PPS PK-3 Early Learning Committee as part of district investment and expansion

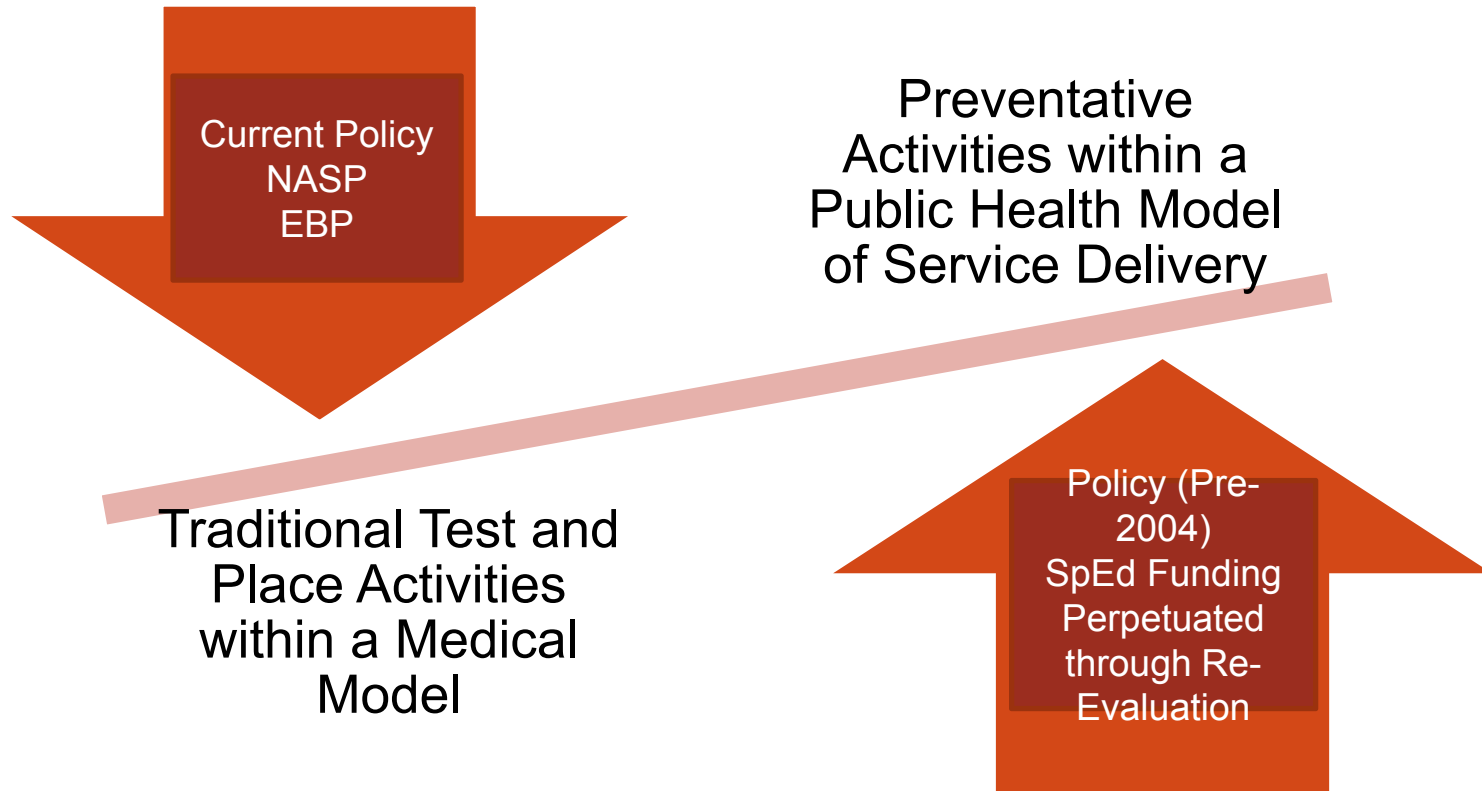
Culturally Responsive PBIS and Restorative Practice



Reach 2020- Gaining National Attention

- School Psychologist service delivery model aligned with the recommendations of National Association of School Psychologist (NASP)

Conceptual Analysis



Pioneer 2.0



School
Culture

- Pioneer Programs will include a continuum of “Services” rather than just a location
- Resources will be reallocated to support inclusive practices district-wide

Reach 2020 in Practice



School
Culture

A psychologist's perspective:

- Year 1 Experience
- Challenges

Instruction/Assessment



Reach 2020

- 100% implementation of IEP's aligned to Common Core
- Inclusive Practices- Co-teaching as a service delivery model option for Learning Specialists and Speech Language Pathologists
 - focus on k-2 and high school

Instruction/Assessment

Inclusive Instruction: Co - Teaching



Reach 2020 in Practice



A Speech Pathologist's perspective: Irvington

- Year 1 Experience
- Challenges

Family and Community Engagement

School-Family
Partnership

Reach 2020

- Staff and Parent Community Partnership- Joint IEP trainings for PPS staff

- Concrete partnerships with community to provide career readiness opportunities to for our students-High Schools and Community Transition Program-40 40 20

- Authentic partnership with historically underserved parent community- “There is no more powerful advocate than a parent armed with information and options.”

Rod Paige, Secretary of Education.

Family and Community Engagement

School-Family
Partnership



Family and Community Engagement

- FOREIGN COUNTRY - SPED

Family and Community Engagement

School-Family
Partnership

- List the 5 top people you cannot live without, please group them such as children, parents, siblings etc.
- Moving homes...- Inclusive Education

Professional Learning Communities

The logo for Professional Learning Communities is a green square with a yellow triangle in the bottom right corner. The text "Professional Learning Communities" is written in white, stacked vertically in the center of the square.

Professional
Learning
Communities

Reach 2020 -Proactive Involvement

-Regional Support Team- Central office, cross discipline teams that support school based interventions and co-teaching

-Data Driven Decision Making (3D) using Team Initiated Problem Solving (TIPS) - A success story
Reflective Practice Protocol- How did student or staff race impact this process and what Professional Development is needed

Community Transition Program



Building a culture of inclusion side by side with Family and Community partners:

- Current Partnerships
- Future Possibilities



Challenges

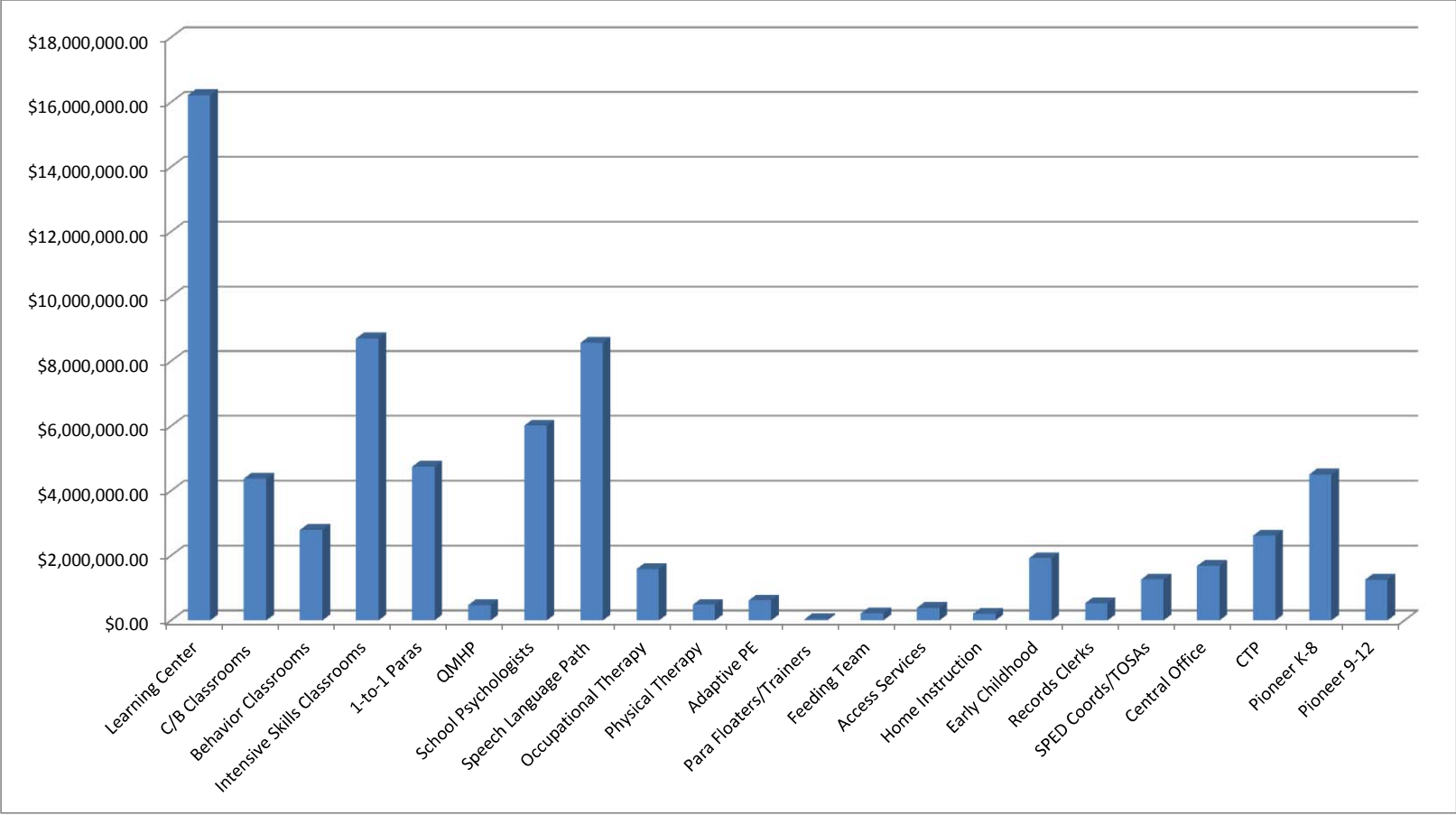
- Lack of consistent practice in all buildings
 - Student Intervention Team
 - CR-PBIS teams
- Access to staff or Professional Development
- Paraeducator request at an all time high
- Resources in Special Education to support this change

Next Steps

- Sped Advisory groups
 - Parents, sped providers, Principals
- Mark your calendars for Community Forums- BESC Boardroom 5:30-7:00pm
 - 1/21 and 4/15

Cost based on current staffing

Learning Center	\$16,216,875.94
C/B Classrooms	\$4,381,047.58
Behavior Classrooms	\$2,795,459.07
Intensive Skills Classrooms	\$8,707,532.25
1-to-1 Paras	\$4,747,616.58
QMHP	\$475,261.68
School Psychologists	\$6,017,329.78
Speech Language Path	\$8,570,052.71
Occupational Therapy	\$1,587,331.26
Physical Therapy	\$482,016.51
Adaptive PE	\$618,966.03
Para Floaters/Trainers	\$47,733.69
Feeding Team	\$216,884.56
Access Services	\$393,607.51
Home Instruction	\$207,844.90
Early Childhood	\$1,922,477.31
Records Clerks	\$530,969.34
SPED Coords/TOSAs	\$1,266,432.03
Central Office	\$1,683,719.90
CTP	\$2,620,161.36
Pioneer K-8	\$4,505,425.63
Pioneer 9-12	\$1,256,096.92
Total	\$69,250,842.55



Model for Comprehensive and Integrated School Psychological Services

NASP PRACTICE MODEL OVERVIEW



*Helping children achieve their best.
In school. At home. In life.*



The NASP Practice Model Helps Schools Successfully:

Improve Academic Engagement and Achievement

High expectations and academic rigor for *all* students set the foundation for schools that both raise expectations and close achievement gaps. However, providing rich content and rigor alone is not enough for struggling students. School psychologists work with educators and families to:

- Identify and remedy barriers to learning, such as disabilities; mental or physical health problems; or social, cultural, language, or family issues
- Implement appropriate academic interventions by monitoring the effectiveness of academic interventions, developing student organizational skills, and promoting the use of learning strategies
- Implement appropriate social–emotional and behavioral strategies such as those that are designed to improve attention, strengthen motivation, and promote student problem-solving

Interventions that foster students' engagement in learning contribute to more positive, orderly classroom environments, increase time focused on learning, and increase school attendance and graduation rates.

Facilitate Effective Instruction

Rigorous, quality curricula must be matched with effective instruction that meets the individual needs of diverse learners. School psychologists consult with teachers on how to:

- Individualize instruction
- Manage classroom behavior
- Monitor student progress
- Evaluate classroom data
- Adjust intervention and instructional strategies to make content accessible to every student

Increasingly, this consultation occurs within a response-to-intervention or problem-solving process, which has been shown to improve achievement for students in the general education classroom and reduce inappropriate referrals to special education. Teachers who consult with their school psychologist receive support for working with struggling students, improve their classroom management and teaching skills, and are more able to focus on effective instruction for all students.

Support Positive Behavior and Socially Successful Students

Promoting students' positive behavior and social interactions directly supports their academic achievement and contributes to a healthy learning environment. School psychologists provide services that promote children's communication and social skills, problem solving, anger

management, conflict resolution, self-regulation, self-determination, resilience, and optimism. They consult with teachers and administrators on:

- Classroom management strategies
- Programs promoting positive peer relationships and social problem solving
- School-wide positive behavior interventions and supports
- The use of effective discipline policies and practices
- Programs to promote student wellness and reduce risk-taking

Additionally, school psychologists provide mental health services, including wellness and prevention programming, risk assessment and interventions, and counseling, which are proven to reduce discipline referrals and increase attendance and academic performance. They also coordinate community services provided in schools to ensure their link to learning.

Support Diverse Learners

Successfully meeting the needs of a wide range of diverse learners can be a challenge for schools. School psychologists have special expertise in working with students who have disabilities or health problems, who face cultural or linguistic barriers, or whose family or socioeconomic situation affects their learning. They work with teachers and other staff to:

- Assess learning and behavior needs and distinguish between issues related to family, culture, or language and a learning style or disability
- Plan appropriate Individualized Education Programs for students with disabilities
- Modify and adapt curricula and instruction
- Adjust classroom facilities and routines to promote greater student engagement
- Promote positive relationships among all students
- Monitor and effectively communicate with parents about student progress
- Coordinate links to community services

School psychologists work with school administrators to ensure that education plans are designed and implemented so students with disabilities receive a free appropriate public education in the least restrictive environments.

Create Safe, Positive School Climates

Positive school climate is a critical factor in student achievement. No matter how good the curriculum and instruction are, a negative learning environment will interfere with student outcomes. School psychologists work with school leadership teams to help choose, design, and evaluate evidence-based approaches to address issues such as bullying prevention, student connectedness, family engagement, cultural responsiveness, and crisis response planning. They contribute expertise in:

NASP Practice Model

The National Association of School Psychologists (NASP) has set standards for the provision of school psychological services for over 30 years. Despite this long-standing guidance to states and local school districts, school psychologists' roles and practice vary significantly across the country. In March 2010, NASP approved a formal model of practice designed to improve the consistent implementation of school psychological services to help ensure their maximum effectiveness, efficiency, and quality in schools nationwide.

The *NASP Model for Comprehensive and Integrated School Psychological Services* also known as the NASP Practice

Model, represents NASP's official policy regarding the delivery of school psychological services. It delineates what services can reasonably be expected from school psychologists across 10 domains of practice, and the general framework within which services should be provided. The recommended ratio for schools implementing this comprehensive model is one school psychologist to 500–700 students. Implementation of the NASP model creates the capacity to make the best, most cost-effective use of school psychologists' skills and expertise, which are an existing but sometimes underutilized resource in schools. The NASP model allows flexibility for agencies and professionals to develop policies and procedures that meet local needs, while also providing sufficient specificity to ensure appropriate, comprehensive service provision.



The NASP Practice Model Helps Schools Successfully:

- Improve academic engagement and achievement
- Facilitate effective instruction
- Support positive behavior and socially successful students
- Support diverse learners
- Create safe, positive school climates
- Strengthen family–school–community partnerships
- Improve assessment and accountability
- Invest existing resources wisely and effectively

NASP Practice Model Organizational Principles

The NASP Practice Model is framed on six organizational principles that reflect and link to the broader organizational principles of effective schools. These principles are summarized below.

Principle 1. Services are coordinated and delivered in a comprehensive and seamless continuum that considers the needs of consumers and utilizes an evidence-based program evaluation model.

Principle 2. The professional climate facilitates effective service delivery that allows school psychologist to advocate for and provide appropriate services.

Principle 3. Physical, personnel, and fiscal systems support appropriately trained and adequate numbers of school psychologists, and provide adequate financial and physical resources to practice effectively.

Principle 4. Policies and practices exist that result in positive, proactive communication among employees at all administrative levels.

Principle 5. All personnel have levels and types of supervision and/or mentoring adequate to ensure the provision of effective and accountable services.

Principle 6. Individual school psychologists and school systems create professional development plans annually that are both adequate for and relevant to the service delivery priorities of the school system.

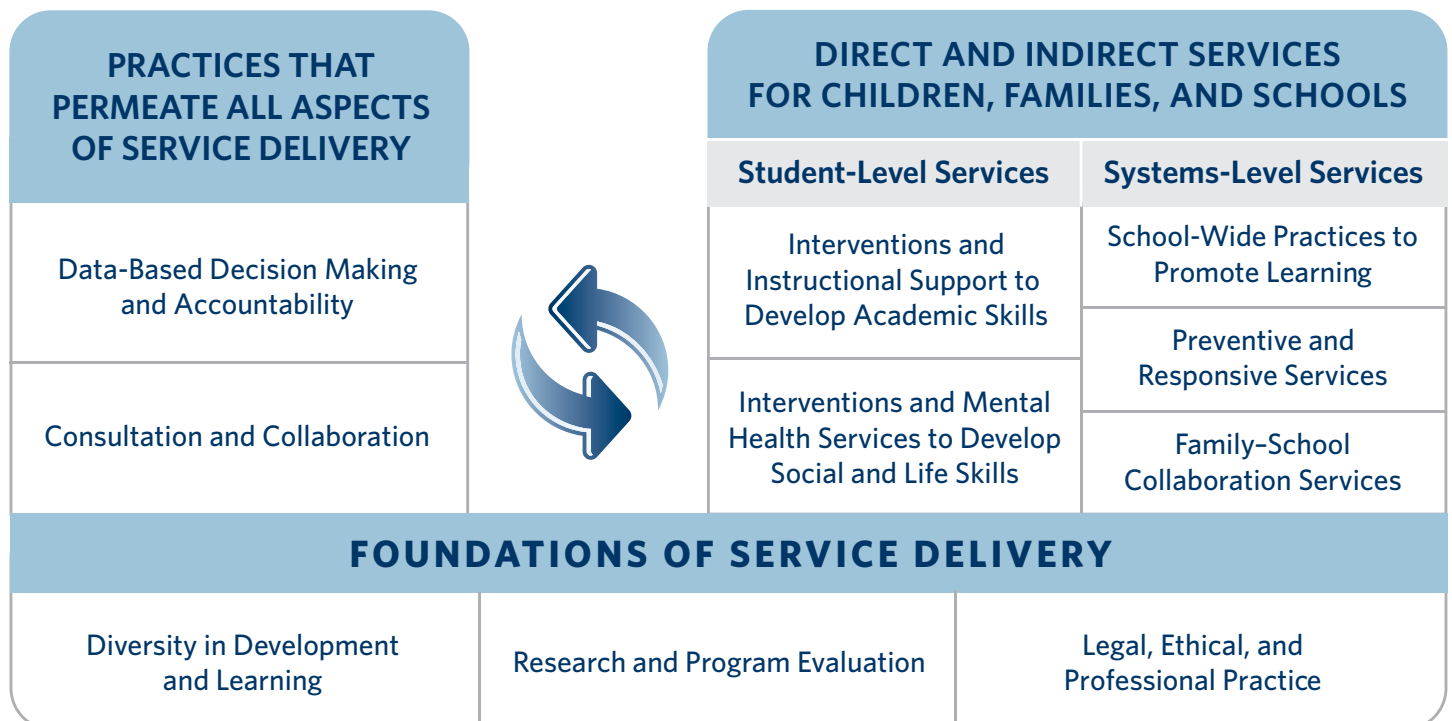
The NASP Practice Model Improves Outcomes for Students and Schools.

All children deserve a high-quality, genuinely accessible education that supports their high academic achievement and healthy development, and prepares them for responsible citizenship and success in a global economy. Services and supports that lower barriers to learning, like those provided by school psychologists, are central to this mission.

School psychologists are uniquely qualified members of school teams that support teachers' ability to teach and children's ability to learn. They provide direct educational, behavioral, and mental health services for children and youth, as well as work with families, school administrators, educators, and other professionals to create supportive learning and social environments for all students.

NATIONAL ASSOCIATION OF SCHOOL PSYCHOLOGISTS

Model for Services by School Psychologists



HELPING STUDENTS AND SCHOOLS ACHIEVE THEIR BEST

10 Domains of Practice

Practices That Permeate All Aspects of Service Delivery

Domain 1: Data-Based Decision Making and Accountability

School psychologists have knowledge of varied models and methods of assessment and data collection for identifying strengths and needs, developing effective services and programs, and measuring progress and outcomes.

Domain 2: Consultation and Collaboration

School psychologists have knowledge of varied models and strategies of consultation, collaboration, and communication applicable to individuals, families, groups, and systems and methods to promote effective implementation of services.

Direct and Indirect Services for Children, Families, and Schools

Student-Level Services

Domain 3: Interventions and Instructional Support to Develop Academic Skills

School psychologists have knowledge of biological, cultural, and social influences on academic skills; human learning, cognitive, and developmental processes; and evidence-based curricula and instructional strategies.

Domain 4: Interventions and Mental Health Services to Develop Social and Life Skills

School psychologists have knowledge of biological, cultural, developmental, and social influences on behavior and mental health, behavioral and emotional impacts on learning and life skills, and evidence-based strategies to promote social-emotional functioning and mental health.

Systems-Level Services

Domain 5: School-Wide Practices to Promote Learning

School psychologists have knowledge of school and systems structure, organization, and theory; general and special education; technology resources;

and evidence-based school practices that promote learning and mental health.

Domain 6: Preventive and Responsive Services

School psychologists have knowledge of principles and research related to resilience and risk factors in learning and mental health, services in schools and communities to support multitiered prevention, and evidence-based strategies for effective crisis response.

Domain 7: Family-School Collaboration Services

School psychologists have knowledge of principles and research related to family systems, strengths, needs, and culture; evidence-based strategies to support family influences on children's learning and mental health; and strategies to develop collaboration between families and schools.

Foundations of School Psychological Service Delivery

Domain 8: Diversity in Development and Learning

School psychologists have knowledge of individual differences, abilities, disabilities, and other diverse student characteristics; principles and research related to diversity factors for children, families, and schools, including factors related to culture, context, and individual and role difference; and evidence-based strategies to enhance services and address potential influences related to diversity.

Domain 9: Research and Program Evaluation

School psychologists have knowledge of research design, statistics, measurement, varied data collection and analysis techniques, and program evaluation sufficient for understanding research and interpreting data in applied settings.

Domain 10: Legal, Ethical, and Professional Practice

School psychologists have knowledge of the history and foundations of school psychology; multiple service models and methods; ethical, legal, and professional standards; and other factors related to professional identity and effective practice as school psychologists.



- Data collection and analysis
- Social–emotional learning
- Child development and behavior
- Violence prevention
- Crisis and trauma prevention and response
- Home–school–community collaboration

Positive school climates contribute to improved academic achievement, graduation rates, student attitudes, and connection in school, and to more trusting, respectful relationships among school staff, students, and families.

Strengthen Family–School Partnerships

Students whose families are engaged in their school experience do better academically, socially, and emotionally. How and to what extent parents and other caregivers are involved in their children’s learning and extracurricular activities depends on many factors, including opportunity, culture, language, attitudes toward school, past experience, access to information, and school climate. School psychologists provide specific support to help families:

- Understand and support their children’s learning and mental health needs
- Navigate special education processes
- Connect with community service providers when necessary

- Engage with teachers and other school staff effectively
- Reinforce the school–family–community partnership

School psychologists work with staff to enhance understanding and acceptance of diverse cultures and backgrounds and to promote culturally responsive schools, which is essential to engaging all families in school life.

Improve Assessment and Accountability

A critical part of making informed decisions is the effective use of data. School psychologists bring extensive knowledge of data collection and analysis to school improvement efforts. They can help school leaders and teachers to:

- Generate and interpret valuable student outcome data
- Make decisions regarding programs and interventions at the district, building, classroom, and individual student levels
- Monitor individual student progress in academics and behavior
- Collect and analyze data on risk and protective factors related to student outcomes

The capacity to both collect the right data and know what to do with the information is essential to meeting the needs of students and making adequate yearly progress and other mandated accountability measures.

A Wise Investment of Existing Resources

School psychologists serve in almost every school in the country. They are a ready resource. Adopting the NASP Practice Model enables schools to make best use of their skills and expertise, and to give all students access to the services that can help them stay engaged and successful in school. School leaders and policy makers interested in moving service provision to the model can work with their school psychologists to assess current practice, resources, and steps toward implementation. NASP provides tools and further guidance to assist in this process; available online at www.nasponline.org/practicemodel. The comprehensive implementation of school psychological services has consistently been shown to support teachers’ ability to teach and students’ ability to learn, and is a cost-effective investment in the success of all students.



NATIONAL
ASSOCIATION OF SCHOOL
PSYCHOLOGISTS

4340 East West Highway, Suite 402
Bethesda, MD 20814
(301) 657-0270
(866) 331-NASP, toll free
(301) 657-0275, fax
(301) 657-4155, TTY
www.nasponline.org

For more information on the NASP Practice Model and the full NASP Standards visit <http://www.nasponline.org/standards/2010standards.aspx>. Please cite this document as: National Association of School Psychologists. (2010). *Model for Comprehensive and Integrated School Psychological Services, NASP Practice Model Overview*. [Brochure]. Bethesda, MD: Author. This brochure is based on the NASP 2010 Standards.

The mission of the National Association of School Psychologists (NASP) is to represent school psychology and support school psychologists to enhance the learning and mental health of all children and youth.

Helping children achieve their best. In school. At home. In life.

IDEA IN PRACTICE

BY MARY BETH KLOTZ

Overrepresentation in Special Education: Discipline Disparities

The issue of disproportionate representation of minority students in special education, particularly among African American males, has been a longstanding concern in the field. The U.S. Department of Education (ED) is considering creating a standard definition for what constitutes significant disproportionality in special education and solicited public comments about this issue last summer. This move was prompted by a report from the Government Accountability Office that found that even though states are required to monitor overrepresentation of minority students in special education, only about 2% of school districts were found to have significant disproportionality based on their state's rules. Specifically, ED requested public comments regarding actions the federal government should take related to significant disproportionality based on race and ethnicity in the identification, placement, and discipline of students with disabilities. Additionally, comments were requested regarding how funds reserved for comprehensive, coordinated early intervening services (CEIS) under Part B of IDEA can be used to effectively address significant disproportionality. ED is currently analyzing the comments received and plans to issue guidance in 2015. Along with considering the public comments, ED is also for the first time asking states to explain how they define whether overidentification (including disciplinary actions) is serious enough to take corrective action and require a school district to spend 15% of their federal special education funds for CEIS. These data will be collected through the federal ED Facts data initiative and released in the spring of 2015.

NASP endorsed a set of recommendations submitted during the public comment period that were developed by the Center for Civil Rights Remedies and supported by more than 50 organizations and scholars. Recommendations in the letter called for ED to:

- Create a model definition of significant disproportionality against which state definitions would be evaluated and approved or rejected.
- Encourage voluntary use of IDEA funds for CEIS to address significant racial disproportionality by: (a) providing incentives for district-level public reporting of data describing the degree of disproportionality in identification, placement, and discipline; (b) stepping up federal enforcement of the requirement that states report racially disaggregated data to the public; and (c) explicitly encouraging the voluntary use of CEIS funding to address possible root causes of

racial disproportionality, including the possible contribution of implicit racial or ethnic bias.

- Ensure that the students whose experiences of racial or ethnic disparities trigger required expenditures for CEIS actually receive the benefits.

In addition to endorsing the Center for Civil Rights Remedies letter, NASP submitted recommendations based on NASP's 2013 position statement on Racial and Ethnic Disproportionality in Education outlining actions school personnel can take to reduce disproportionate placements in special education and discipline disparities. These recommendations included utilizing proactive, preventive approaches to supporting students' social, emotional, behavioral, and learning outcomes via a continuum of supports within a multitiered system of supports. Positive discipline approaches such as school-wide positive behavioral interventions and supports (PBIS), social-emotional learning, and restorative justice approaches were also recommended.

School Psychologists Lead District Plan to Reduce Discipline Disparities

Portland Oregon Public Schools were notified by the Oregon State Department of Education last October that they were being sanctioned for overuse of long-term exclusionary discipline practices with African American special education students during the 2012-2013 school year. This was the second time in recent years that the state department had sanctioned Portland Public Schools for the same problem. Despite improvements in disciplinary patterns after instituting behavioral coaches, the gap in disciplinary rates was still over the desired threshold resulting in the current sanction. Portland is required to use 15% of their federal funding under IDEA for the next 2 years to provide CEIS. School psychologists are playing a lead role in formulating and executing the district-wide response plan that aligns with NASP's Practice Model. School psychologists will spend 15% of their time leading CEIS services in their assigned schools to include the implementation of culturally responsive PBIS, restorative justice, and other strategies in collaboration with PBIS departments (Portland Public Schools, 2014).

References and Resources

Center for Civil Rights Remedies, July 29, 2014 letter to Assistant Secretary Yudin, *CEIS and Significant Disproportionality*. Retrieved from <http://civilrightsproject.ucla.edu>

National Association of School Psychologists. (2013). *Racial and ethnic disproportionality in education* [Position statement]. Bethesda, MD: Author. Retrieved from http://www.nasponline.org/about_nasp/positionpapers/Racial_Ethnic_Disproportionality.pdf

Portland Public Schools Board of Education Informational Report, October 4, 2014 (http://www.pps.k12.or.us/files/board/Final_Packet_10-06-14.pdf)

MARY BETH KLOTZ, PhD, NCSP, is NASP Director, Educational Practice. Sources of information for this column include the Council for Exceptional Children's *Policy Insider* (July 30, 2014).

WE HAVE YOU COVERED!

Professional Liability Insurance for School Psychologists

with Limits of Liability as high as
\$2,000,000 / \$4,000,000

5% Risk Management Discount

35% Part-Time Discount

Sponsored by the

NASP
NATIONAL ASSOCIATION OF
SCHOOL PSYCHOLOGISTS

National Association of
School Psychologists



American Professional Agency, Inc.

800-421-6694

www.AmericanProfessional.com

Smart Phone Scan



Lisa McCall (Lincoln) Charlene Williams (Roosevelt) Lauretta Manning <u>Regional Team:</u> Sally Lundberg, Stuart Jackson, Kate Silver, Shelley Cockburn, Hanna Allen , Jennifer Potegal		Lisa McCall (Madison) Karl Logan (Grant) Lorrie Harris <u>Regional Team:</u> Kristin Lierheimer, Peggy Van Duyne, Kaveh Paskeresht, Kristen Kozlowski and Rebekka Baker		Larry Dashiell (Cleveland/Wilson) Jeff Brown <u>Regional Team:</u> Kristin Lierheimer, Kaveh Paskeresht, Jennifer Caslavka, Dianne Gollhofer and Peggy Van Duyne		Shay James (Franklin) Karl Logan (Jefferson) Linda Moon <u>Regional Team:</u> Sally Lundberg, Stuart Jackson, Kate Silver, Maria Gianotti, Hanna Allen, and Lauren Page		David Lizaola Regional Team: James Loveland, Amanda LeCrone, Claire Skelly, Dani DeYoung ,Ellie Baumgartner Velinda Sloan, ASD (as requested)		Chrystal Grey-Watros <u>Regional Team:</u> John McLaughlin, James Loveland, Carlyn Eames, and Rina Shriki	
Lincoln	Roosevelt	Madison	Grant	Cleveland	Wilson	Franklin	Jefferson	Dual Language	High Schools / ED Options - CBO		
Bridlemile (K-5) 66292	Astor (K-8) 66244	Creative Science (K-8) 66431	Access (K-8) 66482	Abernethy (K-5) 66190	Capitol Hill (K-5) 66303	Arthur Academy (503-257-3936)	Boise Eliot (PK-8) 66171	King (PK-8) 66456	Alliance @ Meek (66574) Alliance @ Benson		
Chapman (K-5) 66295	George (6-8) 66262	Harrison Park (K-8) 65700	Alameda (K-5) 66036	Buckman (K-5) 66230	Gray (6-8) 65676	Arleta (K-8) 66330	Chief Joseph (PK-3) 66255	James John (K-5) 66456	Benson (65100)		
Forest Park (K-5) 65400	Peninsula (K-8) 66275	Lee (K-8) 66144	Beaumont (6-8) 65610	Duniway (K-5) 66343	Hayhurst (K-5) / Odyssey (K-8) 66300	Creston (K-8) 66340	Faubion (PK-8) 65686	Bridger (K-8) 66336	Grant (65160) Jefferson Middle College (65180)		
Easy Sylvan (6) 65560	Rosa Parks (K-5) 66250	Vestal (K-8) 66437	Beverly Cleary (K-8) 66480	Grout (K-5) 66209	Jackson (6-8) 65680	Glencoe (K-5) 66207	Ockley Green (4-8) 65660	Lent (K-8) 66322	Lincoln (65200) Madison (65220)		
MLC (K-12) 65737	Portland Village (503-445-0056)	The Ivy School (503-288-8820)	da Vinci Arts (6-8) 65356	Hosford (6-8) 65640	Maplewood (K-5) 66308	Lane (6-8) 66355	Vernon (K-8) 66415	Beach (K-8) 66236	Roosevelt (65260) Wilson (65280)		
Skyline (K-8) 65212	Trillium (503-285-3833)		Laurelhurst (K-8) 66210	Lewis (K-5) 66360	Markham (K-5) 65681	Marysville (K-8) 66363	Woodlawn (K-8) 66282	Atkinson (K-5) 66333	Franklin 65140 Cleveland 65120		
West Sylvan (6-8) 65690			SEI (503-249-1721)	Llewellyn (K-5) 66216	Rieke (K-5) 65768	Mt. Tabor (6-8) 65646	Kairos (K-2) 503 567.9820	Woodstock (K-5) 66380	DePaul (503-535-1181x105) Mt Scott (503-771-8880)		
Emerson (503-525-6124)			Irvington (K-8) 66185	Sellwood (6-8) 65656	Stephenson (K-5) 66318	Sunnyside (K-8) 66226		Roseway Heights (K-8) 65600	NAYA (503-972-2461) New Avenue (503-517-3918)		
OPAL (503-471-9902)			Sabin (K-8) 66181	Winterhaven (K-8) 66200		Woodmere (K-5) 66373		Kelly (K-5) 66350	Open Meadow Middle (503-978-0809) Open Meadow HS (503-285-0508)		
SW Charter (503-244-1697)				Whitman (K-5) 66370				Ainsworth (K-5) 66288	Outside In (503-445-0976) Portland Communcity College		
LeMonde 503-208-3198								Richmond (K-5) 66220	Portland Youth Builders (503-286-9350) Rosemary Anderson (503-797-7222)		
								Scott (K-8) 66469	SE Works (503-772-2300) Youth Employment & YEI (503-280-1058)		
								Rigler (K-5) 66451	Youth Progress(503-233-6121 x341)		
								Sitton (K-5) 66277	LEP (503-254-2537)		
								Cesar Chavez (K-8) 65666			

Reflective Practice/Debriefing Survey

Before moving students to a more restrictive placement, teams are required to participate in a 30 minute discussion, guided by the Courageous Conversations Protocol, that will provide us with the data needed to improve our service delivery. This exercise in reflective practice will build self/team awareness of our beliefs, actions, and effects of those actions. This feedback loop will help us identify areas needed for professional growth as individuals and as an organization.

* Required

1. School: *

Mark only one oval.

- Abernethy
- Access
- Ainsworth
- Alameda
- Alliance @ Benson
- Alliance @ Meek
- Arleta
- Arthur Academy
- Astor
- Atkinson
- Beach
- Beaumont
- Benson
- Beverly Cleary
- Boise Eliot
- Bridger
- Bridlemile
- Buckman
- Capitol Hill
- Cesar Chavez
- Chapman
- Chief Joseph
- Creative Science
- Creston
- da Vinci Arts
- DePaul
- Duniway

- East Sylvan
- Emerson
- Faubion
- Forest Park
- George
- Glencoe
- Grant
- Gray
- Grout
- Harrison Park
- Hayhurst
- Hosford
- Irvington
- Jackson
- James John
- Jefferson Middle College
- Kelly
- King
- Lane
- Laurelhurst
- Lee
- LeMonde
- Lent
- LEP
- Lewis
- Lincoln
- Llewellyn
- MLC
- Madison
- Maplewood
- Markham
- Marysville
- Mt. Scott
- Mt. Tabor
- NAYA
- New Avenue
- Ockley Green

- OPAL
- Open Meadow High
- Open Meadow Middle
- Outside In
- Peninsula
- Portland Community College
- Portland Village
- Portland Youth Builders
- Richmond
- Rieke
- Rigler
- Roosevelt
- Rosa Parks
- Rosemary Anderson
- Roseway Heights
- Sabin
- Scott
- SE Works
- SEI
- Sellwood
- Sitton
- Skyline
- Stephenson
- Sunnyside
- SW Charter
- The Ivy School
- Trillium
- Vernon
- Vestal
- West Sylvan
- Whitman
- Wilson
- Winterhaven
- Woodlawn
- Woodmere
- Woodstock
- Youth Employment & YEI

Youth Progress

2. **Race and Ethnicity:** *

*Codes used in Synergy

Mark only one oval.

- Asian
- Black or African American (Not Hispanic)
- American Indian or Alaskan Native
- Native Hawaiian or Other Pacific Islander
- White (Not Hispanic)
- Hispanic

3. **Race and Ethnicity (Case Manager):** *

Mark only one oval.

- Asian
- Black or African American (Not Hispanic)
- American Indian or Alaskan Native
- Native Hawaiian or Other Pacific Islander
- White (Not Hispanic)
- Hispanic

4. **Home Language(s)** *

Please select one or more languages that the student speaks at home.

Check all that apply.

- Spanish
- Vietnamese
- Chinese/Cantonese
- Chinese/Mandarin
- Russian
- Somali
- Arabic
- Maay-Maay
- Karen
- Chuukese
- Swahili
- Japanese
- English
- Other: _____

5. Language(s) of Instruction *

Chose the language(s) that best fit the students profile for instruction

Mark only one oval.

- Spanish/English
- Russian/English
- Vietnamese/English
- Japanese/English
- Mandarin/English
- English only

6. Cluster: *

Mark only one oval.

- Cleveland
- Franklin
- Jefferson
- Madison
- Roosevelt
- Wilson
- Grant
- Other

7. Gender *

Mark only one oval.

- Male
- Female
- Transgender

8. Grade: *

Mark only one oval.

- kindergarten
- 1st
- 2nd
- 3rd
- 4th
- 5th
- 6th
- 7th
- 8th
- 9th
- 10th
- 11th
- 12th
- 18-21 yo

9. Primary Disability Category: *

Mark only one oval.

- Autism Spectrum Disorder
- Deaf/Blind
- Communication Disorder
- Emotional Disturbance
- Hearing Impairment
- Intellectual Disability
- Orthopedic Impairment
- Other Health Impairment
- Specific Learning Disability
- Traumatic Brain Injury
- Visual Impairment

10. Team Members Present: *

.....

Survey

11. **If a student with similar needs enrolled at your school tomorrow, what would you need to support him/her? ***

Mark only one oval.

- Professional development
- Materials
- Improved collaboration with staff
- Improved collaboration with families
- Enhanced building-wide systems of support
- Other: _____

12. **How did the role of whiteness influence this student's educational experience? ***

Mark only one oval.

	1	2	3	4	5	
Not at all	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	Tremendous Influence

13. **In what ways did your team consider race when providing instruction and service to this student? ***

This question is part of the survey because 71% of student who were referred to IRT were of color.

14. **What are the student's strengths? ***

15. How did the district office staff help to support your team toward keeping the student in the LRE (neighborhood school)? *

Check the following actions that describe your experience

Check all that apply.

- Recieved immediate and consistent coaching and feedback
- Were introduced to new materials/resources that could support a student with this particular need
- Forms/Tools availabe helped me implement and track interventions
- The placement decision was based on data
- I was confident in the data used for this placement decision

16. What would you have done if the move to a more restrictive placement was not an option?

.....

.....

.....

.....

.....

17. Prioritize your team's professoinal development needs so that in the future you will be better prepared to support a student in his/her neighborhood school. *

1 is the highest priority, 10 is the lowest

Mark only one oval per row.

	1	2	3	4	5	6	7	8	9	10
FBA/BIP	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Instructional Design and Delivery	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Assessment	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Efficient Data Collection	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Equity Training	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Parental Involvement	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Acceleration vs Remediation	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Curriculum Materials	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Effective Use of Para Support	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Communication and Teaming with Gen Ed Staff	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>

18. Was this student supported through your school's tiered system of support (behavior and academic)? *

Mark only one oval.

- Yes
- No
- We don't have one yet

Powered by





Board of Education Informational Report

MEMORANDUM

Date: December 29, 2014

To: Members of the Board of Education

From: Jon Isaacs, Chief of Communications & Public Affairs
Kimm Fox-Middleton, PPS Community Relations Manager
Elise Christiansen, Senior Evaluation Analyst
April Arevalo, Evaluation Analyst

Subject: 2015 PPS Successful Schools Climate Survey

Background

In September, the PPS Board of Education adopted a 2015-16 work plan which directed the Superintendent and staff to develop and conduct a district wide survey measuring school climate. Superintendent Smith, recognizing that a successful climate survey would require collaboration between PPS Research & Evaluation Department & Community Involvement & Public Affairs, directed our two departments to lead the effort in developing the new survey and designing & implementing a strategy & plan for encouraging high levels of participation, especially from parents and guardians.

In response to the Superintendent's directive, a cross departmental working group was convened to review options for the school climate survey, develop a draft mission statement for the survey as recommendations to the board school climate committee. The working group included staff from the PPS Office of Equity & Partnerships, Office of School Performance, Multiple Pathways to Graduations, Office of Student Supports, Community Involvement & Public Affairs, Office of Teaching and Learning, Special Education, and Dual Language Immersion.

Survey Development

The working group recommended, and the Board School Climate Committee affirmed, that PPS adapt the California Healthy Kids Survey as the template for the PPS school climate survey. This California Healthy Kids Survey is administered each year in every public school in California and is certified by the National School Climate Center.

The attached school climate survey (student, staff and parent/guardian surveys included) - the *PPS Successful Schools Climate Survey* – has been heavily edited from the California Healthy Kids Survey to fit our specific needs in PPS, and has been reviewed by the PPS staff working group, the PPS Board School Climate Survey, and the parent/guardian version incorporates input received from an extensive list of community stakeholders including Concerned Parents for Public Schools (CPPS), Stand for Children, Coalition of Communities of Color, Portland Council PTA, PSU Center for Public Service, and SUN Schools

Prior to launch, opportunities will be provided to PAT, PFSP, SEIU and PAPSA to review and provide final feedback on the staff surveys.

In addition to affirming the recommendation to adapt the California Healthy Kids Survey, the Board School Climate Committee also edited and then adopted the following purpose statement for the PPS Successful Schools Survey:

To provide PPS administrators, Principals & teachers with transparent, comprehensive data that measures the differential experience and perceptions of PPS students & families of all races & backgrounds in all PPS schools. This measurable, specific feedback will provide PPS with an actionable framework for the continuous improvement of schools & service to children and families.

What is School Climate?

The National School Climate Center defines school climate as, “the quality and character of school life. A sustainable, positive school climate fosters youth development and learning necessary for a productive, contributing and satisfying life in a democratic role.” School Climate Surveys measure four specific dimensions of school climate:

1. Safety – rules & norms, physical safety, social & emotional security
2. Teaching & Learning - support for learning, social & civil learning
3. Interpersonal Relationships – social supports for students & adults
4. Institutional Environment – physical surroundings, school connectedness & engagement

Administering the PPS Successful Schools Survey

All school staff, parents/guardians will be given the opportunity to take the survey. Additionally, student surveys will be administered to 5th, 7th and 10th grade students. Responses are confidential and the answers will be combined into school reports. Parents/guardians with children at more than one school will be given the opportunity to take the Parent/Guardian survey for each school. Parents/guardians with more than one child at a single school will only be able to take the survey one time. PPS is partnering with the PSU Oregon’s Kitchen Table program to conduct the Parent/Guardian survey. Oregon’s Kitchen Table, a project of the PSU Center for Public Service, has a proven track record of driving high levels of engagement in community surveys across Oregon. Oregon’s Kitchen Table will allow PPS to track respondents by school, race, and several other demographic factors. This will allow the staff outreach team to target our efforts for encouraging parent/guardian participation to the schools where

response levels are low. And it will provide PPS with disaggregated data for Parent/Guardian survey respondents. The student and staff versions of the Successful Schools Survey will be administered by the PPS Research and Evaluation team (R&E).

The staff has designed and already launched an aggressive outreach effort to encourage high levels of participation in the school climate survey. The Successful schools survey participation plan will be a joint effort of the staff from both Community Involvement & Public Affairs and Family Engagement Departments. Our outreach campaign, which will eventually include going to door to door in specific communities, will be specifically focused on PPS Title 1 schools, which have higher numbers of families of color, immersing bilingual students, and other historically underserved communities. Thanks for the Portland Timbers & Thorns we will be entering every family who takes the survey into a drawing to win tickets to see the Portland Thorns and a soccer ball signed by the entire Portland Timbers team.

The staff has set a stretch goal of reaching 40% participation in the Parent/Guardian school climate surveys across the district, and an average of 40% at each school to ensure equity in responses. If necessary, we may keep the climate survey open beyond February 28th to do a final participation push in specific schools.

We have set the week of May 22nd as the expected date for a public release for all climate survey results including the Parent/Guardian, Students and Staff versions.

2014-15

This survey is designed to provide schools with data useful for fostering a positive learning and working environment that promotes academic success among all students. Several questions have been added this year related to closing the racial/ethnic achievement gap, staff working conditions, and special education. Your survey participation is very important to insure accurate and useful data.

The first part of this survey is for all staff and should take less than 15 minutes to complete. The second part is only for staff who provide services or instruction related to health, prevention, discipline, counseling and/or safety.

- Answer the questions based on your experiences only at the school that asked you to complete it, not your experiences with the district overall or another school where you might also work.
- Questions about staff or adults at the school refer to ALL staff — administrators, teachers, teaching assistants, counselors, and all other certificated and classified staff.

All responses are anonymous and confidential. A few questions ask for personal information, such as the work you do at the school, how long you have done it, and your race/ethnicity. But the survey reports provided to your district contain only percentages for all respondents combined. If there are less than 5 respondents in any group, that data are not made available.

Thank you for taking this survey!

**Note: This survey is typically administered online. This PDF is provided for review only.
Please do not administer without permission.**

SECTION 1

1. **What is your role(s) at this school? (Mark All That Apply.)**
 - A) Teacher in grade 5 or above
 - B) Teacher in grade 4 or below
 - C) Special education teacher
 - D) Administrator
 - E) Prevention staff nurse, or health aide
 - F) Counselor, psychologist
 - G) Police, resource officer, or safety personnel
 - H) Paraprofessional, teacher assistant, or instructional aide
 - I) Other certificated staff (e.g., librarian)
 - J) Other classified staff (e.g., janitor, secretarial or clerical, food service)
 - K) Other service provider (e.g., speech, occupational, physical therapist)

2. **Do you provide services to the following types of students? (Mark All That Apply.)**
 - A) Migrant education
 - B) Special education
 - C) English language learners
 - D) None of the above

3. **How many years have you worked, in any position, at this school?**
 - A) Less than one year
 - B) 1 to 2 years
 - C) 3 to 5 years
 - D) 6 to 10 years
 - E) Over 10 years

4. **How many years have you worked at any school in your current position (e.g., teacher, counselor, administrator, food service)?**
 - A) Less than one year
 - B) 1 to 2 years
 - C) 3 to 5 years
 - D) 6 to 10 years
 - E) Over 10 years

5. **What is your race or ethnicity?**
 - A) African American (Not Hispanic)
 - B) American Indian or Alaska Native
 - C) Asian or Pacific Islander
 - D) White (Not Hispanic)
 - E) Hispanic or Latino/a
 - F) Other or Multi-ethnic

Please indicate how much you agree or disagree with the following statements about this school. If the question is not applicable to your job, and you could not know enough to answer it, mark “Not Applicable.”

This school ...

		Strongly Agree	Agree	Disagree	Strongly Disagree	Not Applicable
6.	is a supportive and inviting place for students to learn.	A	B	C	D	E
7.	sets high standards for academic performance for all students.	A	B	C	D	E
8.	promotes academic success for all students.	A	B	C	D	E
9.	emphasizes helping students academically when they need it.	A	B	C	D	E
10.	provides adequate counseling and support services for students.	A	B	C	D	E
11.	emphasizes teaching lessons in ways relevant to students.	A	B	C	D	E
12.	is a supportive and inviting place for staff to work.	A	B	C	D	E
13.	promotes trust and collegiality among staff.	A	B	C	D	E
14.	provides the materials, resources, and training (professional development) needed to do your job effectively.	A	B	C	D	E
15.	provides the materials, resources, and training (professional development) needed to work with special education (IEP) students.	A	B	C	D	E
16.	encourages opportunities for students to decide things like class activities or rules.	A	B	C	D	E
17.	gives all students equal opportunity to participate in classroom discussions or activities.	A	B	C	D	E
18.	gives all students equal opportunity to participate in numerous extracurricular and enrichment activities.	A	B	C	D	E
19.	gives students opportunities to “make a difference” by helping other people, the school, or the community (e.g., service learning).	A	B	C	D	E
20.	encourages students to enroll in rigorous courses (such as honors and AP), regardless of their race, ethnicity, or nationality.	A	B	C	D	E
21.	emphasizes using instructional materials that reflect the culture or ethnicity of its students.	A	B	C	D	E
22.	has staff examine their own cultural biases through professional development or other processes.	A	B	C	D	E
23.	considers closing the racial/ethnic achievement gap a high priority.	A	B	C	D	E

This school ...

	<u>Strongly Agree</u>	<u>Agree</u>	<u>Disagree</u>	<u>Strongly Disagree</u>	<u>Not Applicable</u>
24. fosters an appreciation of student diversity and respect for each other.	A	B	C	D	E
25. emphasizes showing respect for all students' cultural beliefs and practices.	A	B	C	D	E
26. clearly communicates to students the consequences of breaking school rules.	A	B	C	D	E
27. handles discipline problems fairly.	A	B	C	D	E
28. effectively handles student discipline and behavioral problems.	A	B	C	D	E
29. is a safe place for students.	A	B	C	D	E
30. is a safe place for staff.	A	B	C	D	E
31. is welcoming to and facilitates parent involvement.	A	B	C	D	E
32. has clean and well-maintained facilities and property.	A	B	C	D	E

How many adults at this school ...

	<u>Nearly All Adults</u>	<u>Most Adults</u>	<u>Some Adults</u>	<u>Few Adults</u>	<u>Almost None</u>
33. really care about every student?	A	B	C	D	E
34. acknowledge and pay attention to students?	A	B	C	D	E
35. want every student to do their best?	A	B	C	D	E
36. listen to what students have to say?	A	B	C	D	E
37. believe that every student can be a success?	A	B	C	D	E
38. treat all students fairly?	A	B	C	D	E
39. treat every student with respect?	A	B	C	D	E
40. have close professional relationships with one another?	A	B	C	D	E
41. support and treat each other with respect?	A	B	C	D	E
42. feel a responsibility to improve this school?	A	B	C	D	E
43. work hard to ensure a safe and supportive learning environment?	A	B	C	D	E

Do you feel that you need more professional development, training, mentorship or other support to do your job in any of the following areas? If the indicated training is not needed for your job, mark “Not Applicable.”

Area of Professional Development		Yes	No	Not Applicable
44.	meeting academic standards	A	B	C
45.	evidence-based methods of instruction	A	B	C
46.	positive behavioral support and classroom management	A	B	C
47.	working with diverse racial, ethnic, or cultural groups	A	B	C
48.	culturally relevant pedagogy for the school’s student population	A	B	C
49.	serving English language learners	A	B	C
50.	closing the achievement gap	A	B	C
51.	serving special education (IEP) students	A	B	C
52.	meeting the social, emotional, and developmental needs of youth (e.g., resilience promotion)	A	B	C
53.	creating a positive school climate	A	B	C

Based on your experience, how many students at this school ...

		Nearly All	Most	Some	Few	Almost None
54.	are healthy and physically fit?	A	B	C	D	E
55.	arrive at school alert and rested?	A	B	C	D	E
56.	are motivated to learn?	A	B	C	D	E
57.	are well-behaved?	A	B	C	D	E

The next questions ask for your opinions about problems you may have experienced in doing your job at this school.

How much of a problem AT THIS SCHOOL is ...

	Insignificant Problem	Mild Problem	Moderate Problem	Severe Problem
58. student alcohol and drug use?	A	B	C	D
59. student tobacco use?	A	B	C	D
60. harassment or bullying among students?	A	B	C	D
61. physical fighting between students?	A	B	C	D
62. disruptive student behavior?	A	B	C	D
63. racial/ethnic conflict among students?	A	B	C	D
64. student depression or other mental health problems?	A	B	C	D
65. lack of respect of staff by students	A	B	C	D
66. cutting classes or being truant?	A	B	C	D
67. gang-related activity?	A	B	C	D
68. weapons possession?	A	B	C	D
69. vandalism (including graffiti)?	A	B	C	D
70. theft?	A	B	C	D

This school ...

	Strongly Agree	Agree	Disagree	Strongly Disagree	Not Applicable
71. promotes personnel participation in decision-making that affects school practices and policies.	A	B	C	D	E
72. motivates students to learn.	A	B	C	D	E
73. provides the supports needed for teaching culturally and linguistically diverse students.	A	B	C	D	E
74. encourages parents to be active partners in educating their child.	A	B	C	D	E
75. uses objective data such as surveys, truancy counts, and test scores in making school improvement decisions.	A	B	C	D	E
76. takes steps to minimize paper work.	A	B	C	D	E
77. provides adequate benefits (e.g., salary, fringe benefits and retirement options) to support my continued employment.	A	B	C	D	E
78. provides relevant training for paraprofessionals.	A	B	C	D	E
79. provides complete state adopted instructional materials for students with IEPs.	A	B	C	D	E

Please indicate how much you agree or disagree with the following statements about your school.

		<u>Strongly Agree</u>	<u>Agree</u>	<u>Disagree</u>	<u>Strongly Disagree</u>	<u>Not Applicable</u>
		A	B	C	D	E
80.	Teachers here make it clear to students that bullying is not tolerated.	A	B	C	D	E
81.	If a student was bullied, he or she would tell one of the teachers or staff at school.	A	B	C	D	E
82.	Students tell teachers when other students are being bullied.	A	B	C	D	E
83.	If a student tells a teacher that someone is bullying her or him, the teacher will do something to help.	A	B	C	D	E
84.	Students here try to stop bullying when they see it happening.	A	B	C	D	E
85.	There is a lot of tension in this school between people of different cultures, races, or ethnicities.	A	B	C	D	E
86.	Students in this school respect each other's differences (e.g., gender, race, culture, sexual orientation).	A	B	C	D	E
87.	Adults in this school respect differences in students (e.g., gender, race, culture, sexual orientation).	A	B	C	D	E
88.	Teachers show that they think it is important for students of different races and cultures at this school to get along with each other.	A	B	C	D	E
89.	Students enjoy spending time together during school activities.	A	B	C	D	E
90.	Students enjoy collaborating on projects in class.	A	B	C	D	E
91.	Students care about one another.	A	B	C	D	E
92.	Students treat each other with respect.	A	B	C	D	E
93.	Students get along well with one another.	A	B	C	D	E
94.	This school encourages students to feel responsible for how they act.	A	B	C	D	E
95.	Students are often given rewards for being good.	A	B	C	D	E

Please indicate how much you agree or disagree with the following statements about your school.

	<u>Strongly Agree</u>	<u>Agree</u>	<u>Disagree</u>	<u>Strongly Disagree</u>	<u>Not Applicable</u>
96. This school encourages students to understand how others think and feel.	A	B	C	D	E
97. Students are taught that they can control their own behavior.	A	B	C	D	E
98. This school help students solve conflicts with one another.	A	B	C	D	E
99. This school encourages students to care about how others feel.	A	B	C	D	E
100. Teachers go out of their way to help students.	A	B	C	D	E
101. Classes challenge students.	A	B	C	D	E
102. Adults at this school treat all students with respect.	A	B	C	D	E
103. The school rules are fair.	A	B	C	D	E
104. Students in this school are well-behaved.	A	B	C	D	E
105. The rules in the school are too strict.	A	B	C	D	E
106. It is easy for students to get kicked out of class or get suspended.	A	B	C	D	E
107. Students get in trouble for breaking small rules.	A	B	C	D	E
108. Teachers are very strict here.	A	B	C	D	E
109. Rules in this school are made clear to students.	A	B	C	D	E
110. Students know how they are expected to act.	A	B	C	D	E
111. Students know what the rules are.	A	B	C	D	E
112. This school makes it clear how students are expected to act.	A	B	C	D	E
113. Do you have responsibilities for services or instruction related to health, prevention, discipline, counseling and/or safety? A) Yes B) No					

SECTION 2

The following questions are ONLY for staff at this school who have responsibilities for services or instruction related to health, prevention, discipline, counseling and/or safety. If you have such responsibilities, continue through this module. (If not, please go to Section 3.)

How much do you agree with the following statements about this school?

This school ...

	Strongly Agree	Agree	Neither Agree nor Disagree	Disagree	Strongly Disagree
1. collaborates well with community organizations to help address substance use or other problems among youth.	A	B	C	D	E
2. collaborates well with law enforcement organizations.	A	B	C	D	E
3. has sufficient resources to create a safe campus.	A	B	C	D	E
4. has sufficient resources to address substance use prevention needs.	A	B	C	D	E
5. considers sanctions for student violations of rules and policies on a case-by-case basis with a wide range of options.	A	B	C	D	E
6. punishes first-time violations of alcohol or other drug policies by at least an out-of-school suspension.	A	B	C	D	E
7. enforces zero tolerance policies.	A	B	C	D	E
8. seeks to maintain a secure campus through such means as metal detectors, security guards, or personal searches.	A	B	C	D	E
9. provides effective confidential support and referral services for students needing help because of substance abuse, violence, or other problems (e.g., a Student Assistance Program).	A	B	C	D	E
10. considers substance abuse prevention an important goal.	A	B	C	D	E
11. provides adequate health services for students.	A	B	C	D	E
12. provides students with healthy food choices.	A	B	C	D	E
13. emphasizes helping students with their social, emotional, and behavioral problems.	A	B	C	D	E

The next questions ask about this school's health or prevention services and activities.

To what extent does this school ...

	<u>A Lot</u>	<u>Some</u>	<u>Not Much</u>	<u>Not At All</u>
	A	B	C	D
14. foster youth development, resilience, or asset promotion?	A	B	C	D
15. provide nutritional instruction?	A	B	C	D
16. provide opportunities for physical education and activity?	A	B	C	D
17. provide alcohol or drug use prevention instruction?	A	B	C	D
18. provide tobacco use prevention instruction?	A	B	C	D
19. provide conflict resolution or behavior management instruction?	A	B	C	D
20. provide character education?	A	B	C	D
21. provide harassment or bullying prevention?	A	B	C	D
22. provide services for students with disabilities or other special needs?	A	B	C	D
23. Have you participated in professional development that provided an overview of Social and Emotional Learning?				
A) Yes				
B) No				

SECTION 3

The following questions are ONLY for Staff who have participated in professional development on Social and Emotional Learning. If you have, please continue through this module.

1. To what extent have you made changes to your practices as a result of participation in professional development activities on Social and Emotional Learning?
 - A) No change
 - B) Minor change
 - C) Moderate change
 - D) Significant change
 - E) I have not participated in professional development on Social and Emotional Learning

2. Has student learning and engagement improved as a result of changes you have made based on participation in professional development on Social and Emotional Learning?
 - A) No
 - B) Somewhat
 - C) Yes
 - D) I have not made any changes
 - E) I have not participated in professional development on Social and Emotional Learning

3. My school is looking carefully at what practices, programs, and policies we have that promote social and emotional learning.
 - A) Strongly Agree
 - B) Agree
 - C) Disagree
 - D) Strongly Disagree
 - E) Don't know

4. There are school-wide strategies that reinforce students' social and emotional skills outside the classroom.
 - A) Strongly Agree
 - B) Agree
 - C) Disagree
 - D) Strongly Disagree
 - E) Don't know

5. My school has adopted a classroom-based approach for teachers at my grade level(s) to use to promote students' social and emotional learning.
 - A) Yes
 - B) No
 - C) Don't know

6. The social and emotional learning programs that are used in my school are effective at promoting students' social and emotional development.
- A) Strongly Agree
 - B) Agree
 - C) Disagree
 - D) Strongly Disagree
 - E) N/A
7. How important is it to you to support social and emotional learning in a time of budgetary cutbacks?
- A) Not at all important
 - B) Somewhat important
 - C) Important
 - D) Extremely important
8. This school clearly communicates rules and behavioral expectations for students.
- A) Strongly Agree
 - B) Agree
 - C) Neither Agree nor Disagree
 - D) Disagree
 - E) Strongly Disagree

Successful Schools Survey

Portland Public Schools

A School Climate Survey for Parents and Guardians

2014-2015

This survey is an opportunity for you to help this school by sharing your opinions about it. Your opinions are important, and the school is interested in hearing them.

We are particularly interested in your thoughts on this school's efforts to promote academic success and well-being for every student, regardless of race, ethnicity, disability, or other characteristics.

If you have children at more than one PPS school, please complete one survey for each school your children attend.

Answer all the questions based on your experiences at **this** school only. Remember, we appreciate your honest opinions.

The last page of the survey asks you to fill out identifying information for our partner, PSU's Oregon Kitchen Table. Oregon Kitchen Table will use this information to contact you if you win a drawing and will email you to invite you to participate in other Oregon surveys. **Your answers will be kept private and confidential. Your answers will be combined into larger school reports.**

Please begin by writing the name of the school your child attends on the line below:

School Name: _____

Begin by answering the following questions about yourself and your children who attend this school.

1. I am a...

- a. Parent of at least one child at this school
- b. Grandparent, other relative, and/or legal guardian of a child at this school
- c. Not applicable, not sure, or decline to answer

2. How many years have you had children attend this school?

- a. Less than one year
- b. 1 to 2 years
- c. 3 to 5 years
- d. 6 to 10 years
- e. Over 10 years
- f. Not applicable, not sure, or decline to answer

3. In what grade(s) are your children who attend this school? (please select all that apply)

- a. Pre-Kindergarten
- b. Kindergarten
- c. 1st grade
- d. 2nd grade
- e. 3rd grade
- f. 4th grade
- g. 5th grade
- h. 6th grade
- i. 7th grade
- j. 8th grade
- k. 9th grade
- l. 10th grade
- m. 11th grade
- n. 12th grade
- o. Other
- p. Ungraded

**Please indicate how much you agree or disagree with the following statements about this school.
Strongly Agree, Agree, Disagree, Strongly Disagree, Don't Know/NA**

This school...

- 4. promotes academic success for all students.**
- 5. clearly tells students in advance what will happen if they break school rules.**
- 6. encourages all students to enroll in challenging courses regardless of their race, ethnicity, or nationality.**
- 7. gives all students opportunities to "make a difference" by helping other people, the school, or the community.**

- 8. keeps me well-informed about school activities.**
- 9. is an inviting place for students to learn.**
- 10. makes learning enjoyable for my child/children.**
- 11. welcomes input and suggestions from parents.**
- 12. provides students with healthy food choices.**
- 13. provides enough time for my child/children to eat lunch.**
- 14. communicates the importance of respecting all cultural beliefs and practices.**
- 15. provides instructional materials that reflect my child's culture, ethnicity and identity.**
- 16. enforces school rules equally for my child/children and all students.**
- 17. provides quality activities that meet my child's/children's interests and talents, such as sports, clubs, and music.**
- 18. is a safe place for my child/children.**
- 19. provides my child/children quality counseling for their social or emotional needs.**
- 20. keeps me well-informed about my child's/children's progress in school.**
- 21. has a welcoming front office.**
- 22. has someone I can contact if I have questions or concerns.**
- 23. promptly responds to my phone calls, messages, or e-mails.**
- 24. has informed me about the racial/ethnic equity work in the district.**
- 25. has given me the opportunity to participate in racial/ethnic equity work.**

**Please indicate how much you agree or disagree with the following statements about this school.
Strongly Agree, Agree, Disagree, Strongly Disagree, Don't Know/NA**

- 26. My child's teachers effectively support my child's learning needs.**
- 27. My child's teachers and principals show me specific ways to be an active partner in educating my child.**
- 28. Teachers at this school treat all students with respect.**
- 29. Principals at this school treat all students with respect.**
- 30. Other staff at this school treats all students with respect.**

Based on your experience, how much of a problem at this school is...

Not a Problem, Small Problem, Some-what a Problem, Large Problem, Don't Know/NA

- 31. student tobacco use (cigarette smoking and/or Smokeless tobacco such as dip, chew, or snuff)?**
- 32. student use of electronic cigarettes, e- cigarettes or other vaping device such as e- hookah, hook pens or vape pens?**
- 33. student alcohol and drug use?**
- 34. harassment or bullying of students?**
- 35. physical fighting between students?**
- 36. racial/ethnic conflict among students?**
- 37. students not respecting staff?**
- 38. gang-related activity?**
- 39. weapons possession?**
- 40. vandalism (including graffiti)?**

Please indicate how much you agree or disagree with the following statements about this school.

Strongly Agree, Agree, Disagree, Strongly Disagree, Don't Know/NA

This school...

- 41. actively seeks and respects the input of parents before making important decisions.**
- 42. has clean and well-maintained facilities and properties.**
- 43. motivates students to learn.**
- 44. has a supportive learning environment for my child.**
- 45. has adults that really care about students.**

- 46. Does your child get enough physical activity at school (including physical education and recess)?**
 - a. No, never
 - b. Yes, some of the time
 - c. Yes, most of the time
 - d. Yes, all of the time

47. I prefer that my school communicate important information with me by:

- a. Email
- b. Mail
- c. Phone call at home
- d. Send information home with my student
- e. ParentVUE (the school's electronic gradebook)
- f. Schedule meetings and events at school
- g. Phone call during the day (before 5:00 p.m.)
- h. Phone call in the evening (after 5:00 p.m.)
- i. More information in my preferred language (other than English)
- j. Text message
- k. Other
- l. Phone call at work
- m. Phone call during the weekend

48. My school communicates with me in my preferred language

- a. No, never
- b. Yes, some of the time
- c. Yes, most of the time
- d. Yes, all of the time

49. My preferred language is: _____

50. Is your child or children in any of these programs at this school? (Mark all that apply)

- a. Migrant Education Program
- b. Special Education Program or has had an Individual Education Plan (IEP)
- c. English Language Learner (for children learning English)
- d. Talented and Gifted Program or takes Honors/Advanced Placement classes
- e. Not applicable, not sure, or decline to answer

51. Does one or more of your children qualify to receive a free or reduced-price breakfast or lunch at this school?

- a. Yes
- b. No
- c. Not applicable, not sure, or decline to answer

52. If your child or children are in focus/option programs at this school please select your program (select all that apply):

- ACCESS at Rose City Park (1-8)
- Chinese Immersion
- Experiential Learning Environment
- Japanese Immersion
- Mandarin Immersion
- Russian Immersion
- Spanish Immersion
- Special Focus - arts
- Special focus - CTE
- Special focus - history
- Special Focus - Science
- Special focus-Dual Credit
- Special focus-Environmental Studies
- Vietnamese Immersion
- Winterhaven Special focus-Math and science

53. Do you feel like your focus/option program is meeting its goals?

54. What would help you support your children to read more often for fun at home?

55. Is there is anything else you'd like to tell us about your school?

Next, we would like some background information about you.

56. What is your gender?

- a. Male
- b. Female
- c. Other: _____

57. Which of the following best describes you? (Mark All That Apply.)

- a. Heterosexual (straight)
- b. Gay or Lesbian or Bisexual
- c. Transgender
- d. Not sure
- e. Decline to respond

58. **What races/ethnicities do you consider yourself? Please mark all that apply.**

- African American**

- African**
 - Burundian
 - Eritrean
 - Ethiopian
 - Somali
 - Other African: _____

- Other Black**
 - Caribbean Island(s): _____
 - Other Black: _____

- American Indian/Alaska Native**
 - Alaska Native
 - Burns Paiute Tribe
 - Confederated Tribes of the Coos, Lower Umpqua & Siuslaw Indians
 - Confederated Tribes of the Grand Ronde Community of Oregon
 - Confederated Tribes of Siletz Indians
 - Confederated Tribes of the Umatilla Indian Reservation
 - Confederated Tribes of Warm Springs
 - Coquille Indian Tribe
 - Cow Creek Band of Umpqua Tribe of Indians
 - Klamath Tribes
 - Other American Indian Tribe/Nation: _____

- Native/Indigenous to Canada Please describe:** _____

- Asian**
 - Asian Indian
 - Burmese
 - Cambodian
 - Chinese
 - Filipino
 - Hmong
 - Japanese
 - Karen
 - Korean
 - Laotian
 - Mien
 - Nepali

- Thai
- Tibetan
- Vietnamese
- Other Asian: _____

○ **Hispanic/Latino**

- Caribbean Island(s): _____
- Central American Country(s): _____
- Indigenous Mexican, Central American or South American
- Mexican
- South American Country(s): _____
- Other Hispanic/Latino: _____

○ **Middle Eastern/North African Please describe:** _____

○ **Pacific Islander**

- Chuukese
- Guamanian or Chamorro
- Micronesian
- Native Hawaiian
- Samoan
- Tongan
- Other Pacific Islander: _____

○ **White**

- Romanian
- Russian
- Ukrainian
- European Country(s): _____
- Other White: _____

Optional: If you would like to share in your own words how you describe your race, origin, ethnicity, ancestry and/or Tribal affiliations, please use this space:

PSU Oregon Kitchen Table: SIGN UP SURVEY

1. Email:
2. Zip code:
3. First and last name:
4. Year born:
5. Gender
 - a. Male
 - b. Female
 - c. Other: _____
 - d. Choose not to answer
6. What is your Education?
 - a. Less than high school
 - b. High school graduate
 - c. Some college associate or technical
 - d. College graduate
 - e. Post college graduate degree
 - f. Choose not to answer
7. What do you consider yourself to be? Select all that apply
 - a. Asian
 - b. African American / Black
 - c. Hispanic / Latino
 - d. Native American / American Indian
 - e. Pacific Islander
 - f. White / Caucasian
 - g. Other (explain)
 - h. Choose not to answer
8. Party Affiliation
 - a. Republican
 - b. Democrat
 - c. Non-affiliated
 - d. Other (please specify)
 - e. Choose not to answer
9. How did you hear about Oregon's Kitchen Table (please be as specific as possible about who told you about it or where first learned about it)

Oregon Kitchen Table will be hosting the survey on behalf of Portland Public Schools.

Terms of Agreement – By checking the box below, you are agreeing to receive email consultations and periodic updates from Oregon's Kitchen Table.

[Raffle information]

Successful Schools Survey
Portland Public Schools

**5th Grade
Elementary School Student Questionnaire
2014-2015**

This survey is voluntary and your answers are private. **You do not have to complete this survey**, but we hope that you will. We need your help!

Your answers will improve school programs.

Do not write your name on this form. No one but you will know how you answer these questions.

Fill in the bubbles neatly with a #2 pencil.

Please read every question carefully. Mark one choice on your answer sheet for each question.

Thank you for taking this survey!

First, please write the NAME of YOUR SCHOOL:

1. **What grade are you in?**
 - a. 3rd grade
 - b. 4th grade
 - c. 5th grade
 - d. 6th grade
2. **Did you eat breakfast this morning?**
 - a. No
 - b. Yes
3. **How many years have you been at this school?**
 - a. 1 year
 - b. 2 years
 - c. 3 years
 - d. 4 years
 - e. 5 years or more
4. **I plan to go to college or some other school after high school.**
 - a. No
 - b. Yes
 - c. Maybe
5. **Do you attend school in the neighborhood where you live?**
 - a. No
 - b. Yes
6. **The schoolyard and buildings are clean and in good condition.**
 - a. No, never
 - b. Yes, some of the time
 - c. Yes, most of the time
 - d. Yes, all of the time
7. **My school is usually clean and tidy.**
 - a. No, never
 - b. Yes, some of the time
 - c. Yes, most of the time
 - d. Yes, all of the time
8. **The school grounds are kept clean.**
 - a. No, never
 - b. Yes, some of the time
 - c. Yes, most of the time
 - d. Yes, all of the time
9. **Do you feel close to people at school?**
 - a. No, never
 - b. Yes, some of the time
 - c. Yes, most of the time

- d. Yes, all of the time
10. **Are you happy to be at this school?**
- a. No, never
 - b. Yes, some of the time
 - c. Yes, most of the time
 - d. Yes, all of the time
11. **Do you feel like you are part of this school?**
- a. No, never
 - b. Yes, some of the time
 - c. Yes, most of the time
 - d. Yes, all of the time
12. **Are the students at your school motivated to learn?**
- a. No, never
 - b. Yes, some of the time
 - c. Yes, most of the time
 - d. Yes, all of the time
13. **Do you feel that this school is a supportive and inviting place for students to learn?**
- a. No, never
 - b. Yes, some of the time
 - c. Yes, most of the time
 - d. Yes, all of the time
14. **Do teachers treat students fairly at school?**
- a. No, never
 - b. Yes, some of the time
 - c. Yes, most of the time
 - d. Yes, all of the time
15. **Are you given a chance to help decide things at school, like class rules?**
- a. No, never
 - b. Yes, some of the time
 - c. Yes, most of the time
 - d. Yes, all of the time
16. **Do the teachers and other grown-ups at school care about you?**
- a. No, never
 - b. Yes, some of the time
 - c. Yes, most of the time
 - d. Yes, all of the time
17. **Do the teachers and other grown-ups at school tell you when you do a good job?**
- a. No, never
 - b. Yes, some of the time
 - c. Yes, most of the time
 - d. Yes, all of the time

18. **Do the teachers and other grown-ups at school ask you about your ideas?**
- a. No, never
 - b. Yes, some of the time
 - c. Yes, most of the time
 - d. Yes, all of the time
19. **Do the teachers and other grown-ups give you a chance to solve school problems?**
- a. No, never
 - b. Yes, some of the time
 - c. Yes, most of the time
 - d. Yes, all of the time
20. **Do the adults at school ever disrespect you because of your race, ethnicity, or culture?**
- a. No, never
 - b. Yes, some of the time
 - c. Yes, most of the time
 - d. Yes, all of the time
21. **Do you get to do interesting activities at school?**
- a. No, never
 - b. Yes, some of the time
 - c. Yes, most of the time
 - d. Yes, all of the time
22. **Do your teachers ask you what you want to learn about?**
- a. No, never
 - b. Yes, some of the time
 - c. Yes, most of the time
 - d. Yes, all of the time
23. **My class lessons include examples of my racial, ethnic, or cultural background**
- a. No, never
 - b. Yes, some of the time
 - c. Yes, most of the time
 - d. Yes, all of the time
24. **If I don't understand something, my teacher explains it another way.**
- a. No, never
 - b. Yes, some of the time
 - c. Yes, most of the time
 - d. Yes, all of the time
25. **My teacher pushes everybody to work hard.**
- a. No, never
 - b. Yes, some of the time
 - c. Yes, most of the time
 - d. Yes, all of the time
26. **Do the teachers and other grown-ups at school listen when you have something to say?**
- a. No, never
 - b. Yes, some of the time

- c. Yes, most of the time
 - d. Yes, all of the time
27. **Do the teachers and other grown-ups at school believe that you can do a good job?**
- a. No, never
 - b. Yes, some of the time
 - c. Yes, most of the time
 - d. Yes, all of the time
28. **Do you do things to be helpful at school?**
- a. No, never
 - b. Yes, some of the time
 - c. Yes, most of the time
 - d. Yes, all of the time
29. **My classmates behave the way my teacher wants them to.**
- a. No, never
 - b. Yes, some of the time
 - c. Yes, most of the time
 - d. Yes, all of the time
30. **Do teachers and other grown-ups at school treat students with respect?**
- a. No, never
 - b. Yes, some of the time
 - c. Yes, most of the time
 - d. Yes, all of the time
31. **Is it easy for students to get kicked out of class or get suspended at this school?**
- a. No, never
 - b. Yes, some of the time
 - c. Yes, most of the time
 - d. Yes, all of the time
32. **Are students treated fairly when they break school rules?**
- a. No, never
 - b. Yes, some of the time
 - c. Yes, most of the time
 - d. Yes, all of the time
33. **Are students at this school well behaved?**
- a. No, never
 - b. Yes, some of the time
 - c. Yes, most of the time
 - d. Yes, all of the time
34. **Do you know what the rules are?**
- a. No, never
 - b. Yes, some of the time
 - c. Yes, most of the time
 - d. Yes, all of the time

35. **Does your school help students solve conflicts with one another?**
- a. No, never
 - b. Yes, some of the time
 - c. Yes, most of the time
 - d. Yes, all of the time
36. **Does your school teach students to care about each other and treat each other with respect?**
- a. No, never
 - b. Yes, some of the time
 - c. Yes, most of the time
 - d. Yes, all of the time
37. **Do the teachers and other grown-ups at this school make it clear that bullying is not allowed?**
- a. No, never
 - b. Yes, some of the time
 - c. Yes, most of the time
 - d. Yes, all of the time
38. **If you tell a teacher or other grown-ups at this school that you've been bullied, will they do something to help?**
- a. No, never
 - b. Yes, some of the time
 - c. Yes, most of the time
 - d. Yes, all of the time
39. **Do students at your school try to stop bullying when they see it happening?**
- a. No, never
 - b. Yes, some of the time
 - c. Yes, most of the time
 - d. Yes, all of the time
40. **Do you finish all your class assignments?**
- a. No, never
 - b. Yes, some of the time
 - c. Yes, most of the time
 - d. Yes, all of the time
41. **When you get a bad grade, do you try even harder the next time?**
- a. No, never
 - b. Yes, some of the time
 - c. Yes, most of the time
 - d. Yes, all of the time
42. **Do you keep working and working on your schoolwork until you get it right?**
- a. No, never
 - b. Yes, some of the time
 - c. Yes, most of the time
 - d. Yes, all of the time

43. **Do you do your class assignments even when they're really hard for you?**
- a. No, never
 - b. Yes, some of the time
 - c. Yes, most of the time
 - d. Yes, all of the time
44. **Do you follow the classroom rules?**
- a. No, never
 - b. Yes, some of the time
 - c. Yes, most of the time
 - d. Yes, all of the time
45. **Do you follow the playground rules at recess and lunch times?**
- a. No, never
 - b. Yes, some of the time
 - c. Yes, most of the time
 - d. Yes, all of the time
46. **Do you listen when your teacher is talking?**
- a. No, never
 - b. Yes, some of the time
 - c. Yes, most of the time
 - d. Yes, all of the time
47. **Are you nice to other students?**
- a. No, never
 - b. Yes, some of the time
 - c. Yes, most of the time
 - d. Yes, all of the time
48. **Do other kids hit or push you at school when they are not just playing around?**
- a. No, never
 - b. Yes, some of the time
 - c. Yes, most of the time
 - d. Yes, all of the time
49. **Do other kids at school spread mean rumors or lies about you?**
- a. No, never
 - b. Yes, some of the time
 - c. Yes, most of the time
 - d. Yes, all of the time
50. **During the past year, have you ever seen another kid with a gun or knife at school?**
- a. No
 - b. Yes
51. **Do you feel safe at school?**
- a. No, never
 - b. Yes, some of the time
 - c. Yes, most of the time
 - d. Yes, all of the time

52. **Do you feel safe walking to and from school?**
- a. No, never
 - b. Yes, some of the time
 - c. Yes, most of the time
 - d. Yes, all of the time
53. **Have other kids at school ever teased you about your race, ethnicity or national origin?**
- a. No
 - b. Yes
54. **Have other kids at school ever teased you about your religion?**
- a. No
 - b. Yes
55. **Have other kids at school ever teased you about your gender (being male or female)?**
- a. No
 - b. Yes
56. **Have other kids at school ever teased you about a physical or mental disability?**
- a. No
 - b. Yes
57. **Have other kids at school ever teased you about what your body looks like?**
- a. No
 - b. Yes
58. **Have other kids at school ever teased you for any other reason (like the amount of money your family has, your clothes, or any other reason)?**
- a. No
 - b. Yes
59. **Please explain:** _____

Tell us how you feel about your safety at this school.

60. **I feel safe in the cafeteria/lunchroom.**
- a. No
 - b. Yes
61. **I feel safe in the hallways.**
- a. No
 - b. Yes
62. **I feel safe in the locker rooms/gym.**
- a. No
 - b. Yes
63. **I feel safe in the restrooms.**
- a. No
 - b. Yes

64. **I feel safe in the courtyard/common areas.**
- a. No
 - b. Yes
65. **I feel safe when taking the bus (or walking) to and from school.**
- a. No
 - b. Yes
66. **I feel safe in the parking lot.**
- a. No
 - b. Yes

Here are questions about your home.

67. **Does a parent or some other grown-up at home care about your schoolwork?**
- a. No, never
 - b. Yes, some of the time
 - c. Yes, most of the time
 - d. Yes, all of the time
68. **Does a parent or some other grown-up at home believe that you can do a good job?**
- a. No, never
 - b. Yes, some of the time
 - c. Yes, most of the time
 - d. Yes, all of the time
69. **Does a parent or some other grown-up at home ask if you did your homework?**
- a. No, never
 - b. Yes, some of the time
 - c. Yes, most of the time
 - d. Yes, all of the time
70. **Does a parent or some other grown-up at home check your homework?**
- a. No, never
 - b. Yes, some of the time
 - c. Yes, most of the time
 - d. Yes, all of the time
71. **Does a parent or some other grown-up at home ask you about your grades?**
- a. No, never
 - b. Yes, some of the time
 - c. Yes, most of the time
 - d. Yes, all of the time
72. **Did you understand the questions on this survey?**
- a. No, none of them
 - b. Yes, some of them
 - c. Yes, most of them
 - d. Yes, all of them

73. **Did you answer the questions on this survey honestly and truthfully?**

- a. No, none of them
- b. Yes, some of them
- c. Yes, most of them
- d. Yes, all of them

74. **If you are in a focus/option program please select your program (select one):**

- ACCESS at Rose City Park (1-8)
- Chinese Immersion
- Experiential Learning Environment
- Japanese Immersion
- Mandarin Immersion
- Russian Immersion
- Spanish Immersion
- Special Focus - arts
- Special focus - CTE
- Special focus - history
- Special Focus - Science
- Special focus-Dual Credit
- Special focus-Environmental Studies
- Vietnamese Immersion
- Winterhaven Special focus-Math and science

75. **Do you feel like your focus/option program is meeting its goals?**

76. **What would help you read more often for fun at home?**

77. **Is there is anything else you'd like to tell us about your school?**

Next, we would like some background information about you.

78. How old are you?

- a. 7 years old, or younger than 7
- b. 8 years old
- c. 9 years old
- d. 10 years old
- e. 11 years old
- f. 12 years old
- g. 13 years old, or older than 13

79. Are you female or male?

- a. Female
- b. Male

What races/ethnicities do you consider yourself? Please mark all that apply.

- African American**

- African**
 - Burundian
 - Eritrean
 - Ethiopian
 - Somali
 - Other African: _____

- Other Black**
 - Caribbean Island(s): _____
 - Other Black: _____

- American Indian/Alaska Native**
 - Alaska Native
 - Burns Paiute Tribe
 - Confederated Tribes of the Coos, Lower Umpqua & Siuslaw Indians
 - Confederated Tribes of the Grand Ronde Community of Oregon
 - Confederated Tribes of Siletz Indians
 - Confederated Tribes of the Umatilla Indian Reservation
 - Confederated Tribes of Warm Springs
 - Coquille Indian Tribe
 - Cow Creek Band of Umpqua Tribe of Indians
 - Klamath Tribes
 - Other American Indian Tribe/Nation: _____

- Native/Indigenous to Canada Please describe:** _____

- Asian**
 - Asian Indian
 - Burmese
 - Cambodian
 - Chinese
 - Filipino
 - Hmong
 - Japanese
 - Karen
 - Korean
 - Laotian
 - Mien
 - Nepali

- Thai
- Tibetan
- Vietnamese
- Other Asian: _____

- **Hispanic/Latino**
 - Caribbean Island(s): _____
 - Central American Country(s): _____
 - Indigenous Mexican, Central American or South American
 - Mexican
 - South American Country(s): _____
 - Other Hispanic/Latino: _____

- **Middle Eastern/North African Please describe:** _____

- **Pacific Islander**
 - Chuukese
 - Guamanian or Chamorro
 - Micronesian
 - Native Hawaiian
 - Samoan
 - Tongan
 - Other Pacific Islander: _____

- **White**
 - Romanian
 - Russian
 - Ukrainian
 - European Country(s): _____
 - Other White: _____

Optional: If you would like to share in your own words how you describe your race, origin, ethnicity, ancestry and/or Tribal affiliations, please use this space:

Successful Schools Survey

Portland Public Schools

7th Grade

Middle School Student Questionnaire

2014-2015

This survey asks about your behavior, experiences, and attitudes related to your school, health, and well-being.

You do not have to answer these questions, but your answers will be very helpful in improving school programs. **You will be able to answer** whether or not you have done or experienced any of these things.

Please do not write your name on this form or the answer sheet. Do not identify yourself in any other way.

Please mark all of your answers on the answer sheet. Fill in the bubbles neatly with a **#2 pencil**. Mark only one answer unless told to ***“Mark All That Apply.”***

This survey asks about things you may have done during different periods of time, such as during your **lifetime** (for example, did you ever do something?), or the past **12 months**, or **30 days**. Each provides different information. Please pay careful attention to these time periods.

Thank you for taking this survey!

First, please write the NAME of YOUR SCHOOL:

Next, we would like some background information about you.

1. **What grade are you in?**
 - a. 6th grade
 - b. 7th grade
 - c. 8th grade
2. **Did you eat breakfast today?**
 - a. No
 - b. Yes
3. **How many years have you been at this school?**
 - a. 1 year
 - b. 2 years
 - c. 3 years
 - d. 4 years
 - e. 5 years or more
4. **I plan to go to college or some other school after high school.**
 - a. No
 - b. Yes
 - c. Maybe
5. **Do you attend school in the neighborhood where you live?**
 - a. No
 - b. Yes
6. **The schoolyard and buildings are clean and in good condition.**
 - a. No, never
 - b. Yes, some of the time
 - c. Yes, most of the time
 - d. Yes, all of the time
7. **My school is usually clean and tidy.**
 - a. No, never
 - b. Yes, some of the time
 - c. Yes, most of the time
 - d. Yes, all of the time
8. **The school grounds are kept clean.**
 - a. No, never
 - b. Yes, some of the time
 - c. Yes, most of the time
 - d. Yes, all of the time

9. **During the past 12 months, about how many times did you skip school or cut classes?**
- 0 times
 - 1–2 times
 - A few times
 - Once a month
 - Once a week
 - More than once a week
10. **In the past 30 days, did you miss school for any of the following reasons? (Mark All That Apply.)**
- Does not apply, I didn't miss any school
 - Illness (feeling physically sick), including problems with breathing or your teeth
 - Felt very sad, hopeless, anxious, stressed, or angry
 - Didn't get enough sleep
 - Didn't feel safe at school
 - Had to work
 - Had to take care of or help a family member or friend
 - Wanted to spend time with friends who don't go to your school
 - Wanted to use alcohol or drugs
 - Were behind in schoolwork or weren't prepared for a test or class assignment
 - Were bored with or uninterested in school
 - Were suspended
 - Other reason

How strongly do you agree or disagree with the following statements?

	<u>Strongly Disagree</u>	<u>Disagree</u>	<u>Neither Disagree Nor Agree</u>	<u>Agree</u>	<u>Strongly Agree</u>
11. I feel close to people at this school.					
12. I am happy to be at this school.					
13. I feel like I am part of this school.					
14. This school is a supportive and inviting place for students to learn.	A	B	C	D	E
15. The teachers at this school treat students fairly.	A	B	C	D	E
16. I feel safe in my school.	A	B	C	D	E
17. I try hard to make sure that I am good at my schoolwork.	A	B	C	D	E
18. I try hard at school because I am interested in my work.	A	B	C	D	E
19. I work hard to try to understand new things at school.	A	B	C	D	E
20. I am always trying to do better in my schoolwork.					
21. My class lessons include examples of my racial, ethnic or cultural background.	A	B	C	D	E
22. If I don't understand something, my teachers explain it another way.	A	B	C	D	E
23. My teachers push everybody to work hard.	A	B	C	D	E
24. My classmates behave the way my teachers want them to.					
25. It is easy for students to get kicked out of class or get suspended.					
26. I have been disrespected by adults at school because of my race, ethnicity, or culture.					

Please mark on your answer sheet how TRUE you feel each of the following statements is about your SCHOOL and things you might do there.

At my school, there is a teacher or some other adult ...

	Not At All True	A Little True	Pretty Much True	Very Much True
27. who really cares about me.	A	B	C	D
28. who tells me when I do a good job.	A	B	C	D
29. who notices when I'm not there.	A	B	C	D
30. who always wants me to do my best.	A	B	C	D
31. who listens to me when I have something to say.	A	B	C	D
32. who believes that I will be a success.	A	B	C	D

At school, ...

	Not At All True	A Little True	Pretty Much True	Very Much True
33. I do interesting activities.	A	B	C	D
34. I help decide things like class activities or rules.	A	B	C	D
35. I do things that make a difference.	A	B	C	D

Next are questions about violence, safety, harassment, & bullying on school property.

36. How safe do you feel when you are at school?

- a. Very safe
- b. Safe
- c. Neither safe nor unsafe
- d. Unsafe
- e. Very unsafe

37. How safe do you feel in the cafeteria/lunchroom?

- a. Very safe
- b. Safe
- c. Unsafe
- d. Very unsafe

38. How safe do you feel in the hallways?

- a. Very safe
- b. Safe
- c. Unsafe
- d. Very unsafe

39. How safe do you feel in the locker rooms/gym?

- a. Very safe
- b. Safe
- c. Unsafe
- d. Very unsafe

40. How safe do you feel in the restrooms?

- a. Very safe
- b. Safe
- c. Unsafe

- d. Very unsafe
- 41. **How safe do you feel in the courtyard/common areas?**
 - a. Very safe
 - b. Safe
 - c. Unsafe
 - d. Very unsafe
- 42. **How safe do you feel when taking the bus (or walking) to and from school?**
 - a. Very safe
 - b. Safe
 - c. Unsafe
 - d. Very unsafe
- 43. **How safe do you feel in the parking lot?**
 - a. Very safe
 - b. Safe
 - c. Unsafe
 - d. Very unsafe

During the past 12 months, how many times on school property have you ...

	<u>Happened on School Property</u>			
	<u>0 Times</u>	<u>1 Time</u>	<u>2 to 3 Times</u>	<u>4 or More Times</u>
44. been pushed, shoved, slapped, hit, or kicked by someone who wasn't just kidding around?	A	B	C	D
45. been afraid of being beaten up?	A	B	C	D
46. been in a physical fight?	A	B	C	D
47. had mean rumors or lies spread about you?	A	B	C	D
48. had sexual jokes, comments, or gestures made to you?	A	B	C	D
49. been made fun of because of your looks or the way you talk?	A	B	C	D
50. had your property stolen or deliberately damaged, such as your car, clothing, or books?	A	B	C	D
51. been offered, sold, or given an illegal drug?	A	B	C	D
52. been threatened or injured with a weapon (gun, knife, club, etc.)?	A	B	C	D
53. seen someone carrying a gun, knife, or other weapon?	A	B	C	D
54. been threatened with harm or injury?	A	B	C	D
55. been made fun of, insulted, or called names?	A	B	C	D

During the past 12 months, how many times on school property were you harassed or bullied for any of the following reasons? [You were **bullied** if you were shoved, hit, threatened, called mean names, teased, or had other unpleasant physical or verbal things done to you repeatedly or in a severe way. It is **not bullying** when two students of about the same strength quarrel or fight.]

	0 Times	1 Time	2 to 3 Times	4 or More Times
56. Your race, ethnicity, or national origin	A	B	C	D
57. Your religion	A	B	C	D
58. Your gender (being male or female)	A	B	C	D
59. Because you are gay or lesbian or someone thought you were	A	B	C	D
60. A physical or mental disability	A	B	C	D
61. Any other reason (like the amount of money your family has, your clothes, or any other reason)	A	B	C	D
62. Please explain: _____				
63. During the past 12 months, how many times did other students spread mean rumors or lies about you on the internet (i.e., Facebook™, email, instant message, Instagram, Twitter, Snapchat, Vine)?				
a. 0 times (never)				
b. 1 time				
c. 2–3 times				
d. 4 or more times				
64. During the past 12 months, did you ever feel so sad or hopeless almost every day for two weeks or more that you stopped doing some usual activities?				
a. No				
b. Yes				
65. How many questions in this survey did you answer honestly?				
a. All of them				
b. Most of them				
c. Only some of them				
d. Hardly any				

66. If you are in a focus/option program please select your program (select one):

- ACCESS at Rose City Park (1-8)
- Chinese Immersion
- Experiential Learning Environment
- Japanese Immersion
- Mandarin Immersion
- Russian Immersion
- Spanish Immersion
- Special Focus - arts
- Special focus - CTE
- Special focus - history
- Special Focus - Science
- Special focus-Dual Credit
- Special focus-Environmental Studies
- Vietnamese Immersion
- Winterhaven Special focus-Math and science

67. Do you feel like your focus/option program is meeting its goals?

68. What would help you read more often for fun at home?

69. Is there is anything else you'd like to tell us about your school?

Tell us a little bit about yourself.

70. How old are you?

- a. 10 years old or younger
- b. 11 years old
- c. 12 years old
- d. 13 years old
- e. 14 years old
- f. 15 years old
- g. 16 years old
- h. 17 years old
- i. 18 years old or older

71. What is your gender?

- a. Male
- b. Female
- c. Other: _____

72. Which of the following best describes you? (Mark All That Apply.)

- a. Heterosexual (straight)
- b. Gay or Lesbian or Bisexual
- c. Transgender
- d. Not sure
- e. Decline to respond

What races/ethnicities do you consider yourself? Please mark all that apply.

- African American**

- African**
 - Burundian
 - Eritrean
 - Ethiopian
 - Somali
 - Other African: _____

- Other Black**
 - Caribbean Island(s): _____
 - Other Black: _____

- American Indian/Alaska Native**
 - Alaska Native
 - Burns Paiute Tribe
 - Confederated Tribes of the Coos, Lower Umpqua & Siuslaw Indians
 - Confederated Tribes of the Grand Ronde Community of Oregon
 - Confederated Tribes of Siletz Indians
 - Confederated Tribes of the Umatilla Indian Reservation
 - Confederated Tribes of Warm Springs
 - Coquille Indian Tribe
 - Cow Creek Band of Umpqua Tribe of Indians
 - Klamath Tribes
 - Other American Indian Tribe/Nation: _____

- Native/Indigenous to Canada Please describe:** _____

- Asian**
 - Asian Indian
 - Burmese
 - Cambodian
 - Chinese
 - Filipino
 - Hmong
 - Japanese
 - Karen
 - Korean
 - Laotian
 - Mien

- Nepali
- Thai
- Tibetan
- Vietnamese
- Other Asian: _____

- **Hispanic/Latino**
 - Caribbean Island(s): _____
 - Central American Country(s): _____
 - Indigenous Mexican, Central American or South American
 - Mexican
 - South American Country(s): _____
 - Other Hispanic/Latino: _____

- **Middle Eastern/North African Please describe:** _____

- **Pacific Islander**
 - Chuukese
 - Guamanian or Chamorro
 - Micronesian
 - Native Hawaiian
 - Samoan
 - Tongan
 - Other Pacific Islander: _____

- **White**
 - Romanian
 - Russian
 - Ukrainian
 - European Country(s): _____
 - Other White: _____

Optional: If you would like to share in your own words how you describe your race, origin, ethnicity, ancestry and/or Tribal affiliations, please use this space:

Successful Schools Survey

Portland Public Schools

10th Grade

High School Questionnaire

2014-2015

This survey asks about your behavior, experiences, and attitudes related to your school, health, and well-being.

You do not have to answer these questions, but your answers will be very helpful in improving school programs. **You will be able to answer** whether or not you have done or experienced any of these things.

Please do not write your name on this form or the answer sheet. Do not identify yourself in any other way.

Fill in the bubbles neatly with a **#2 pencil**. Mark only one answer unless told to ***“Mark All That Apply.”***

This survey asks about things you may have done during different periods of time, such as during your **lifetime** (for example, did you ever do something?), or the past **12 months**, or **30 days**. Each provides different information. Please pay careful attention to these time periods.

Thank you for taking this survey!

1. **First, please write the NAME of YOUR SCHOOL:**

2. **What grade are you in?**
 - a. 6th grade
 - b. 7th grade
 - c. 8th grade
 - d. 9th grade
 - e. 10th grade
 - f. 11th grade
 - g. 12th grade
3. **Did you eat breakfast this morning?**
 - a. No
 - b. Yes
4. **How many years have you been at this school?**
 - a. 1 year
 - b. 2 years
 - c. 3 years
 - d. 4 years
 - e. 5 years or more
5. **I plan to go to college or some other school after high school.**
 - a. No
 - b. Yes
 - c. Maybe
6. **Do you attend school in the neighborhood where you live?**
 - a. No
 - b. Yes
7. **The schoolyard and buildings are clean and in good condition.**
 - a. No, never
 - b. Yes, some of the time
 - c. Yes, most of the time
 - d. Yes, all of the time
8. **My school is usually clean and tidy.**
 - a. No, never
 - b. Yes, some of the time
 - c. Yes, most of the time
 - d. Yes, all of the time
9. **The school grounds are kept clean.**
 - a. No, never
 - b. Yes, some of the time
 - c. Yes, most of the time
 - d. Yes, all of the time
10. **During the past 12 months, about how many times did you skip school or cut classes?**
 - a. 0 times

- b. 1–2 times
- c. A few times
- d. Once a month
- e. Once a week
- f. More than once a week

11. In the past 30 days, did you miss school for any of the following reasons? (*Mark All That Apply.*)

- a. Does not apply, I didn't miss any school
- b. Illness (feeling physically sick), including problems with breathing or your teeth
- c. Felt very sad, hopeless, anxious, stressed, or angry
- d. Didn't get enough sleep
- e. Didn't feel safe at school
- f. Had to work
- g. Had to take care of or help a family member or friend
- h. Wanted to spend time with friends who don't go to your school
- i. Wanted to use alcohol or drugs
- j. Were behind in schoolwork or weren't prepared for a test or class assignment
- k. Were bored with or uninterested in school
- l. Were suspended
- m. Other reason

How strongly do you agree or disagree with the following statements

	<u>Strongly Disagree</u>	<u>Disagree</u>	<u>Neither Disagree Nor Agree</u>	<u>Agree</u>	<u>Strongly Agree</u>
12. I feel close to people at this school.	A	B	C	D	E
13. I am happy to be at this school.	A	B	C	D	E
14. I feel like I am part of this school.	A	B	C	D	E
15. This school is a supportive and inviting place for students to learn.	A	B	C	D	E
16. The teachers at this school treat students fairly.	A	B	C	D	E
17. I feel safe in my school.	A	B	C	D	E
18. I try hard to make sure that I am good at my schoolwork.	A	B	C	D	E
19. I try hard at school because I am interested in my work.	A	B	C	D	E
20. I work hard to try to understand new things at school.	A	B	C	D	E
21. I am always trying to do better in my schoolwork.	A	B	C	D	E
22. My class lessons include examples of my racial, ethnic or cultural background.	A	B	C	D	E
23. If I don't understand something, my teachers explain it another way.	A	B	C	D	E
24. My teachers push everybody to work hard.	A	B	C	D	E
25. My classmates behave the way my teachers want them to.	A	B	C	D	E
26. It is easy for students to get kicked out of class or get suspended.	A	B	C	D	E
27. I have been disrespected by adults at school because of my race, ethnicity, or culture.	A	B	C	D	E

Please mark on your answer sheet how TRUE you feel each of the following statements is about your SCHOOL and things you might do there.

At my school, there is a teacher or some other adult ...

	<u>Not At All True</u>	<u>A Little True</u>	<u>Pretty Much True</u>	<u>Very Much True</u>
28. who really cares about me.	A	B	C	D
29. who tells me when I do a good job.	A	B	C	D
30. who notices when I'm not there.	A	B	C	D
31. who always wants me to do my best.	A	B	C	D
32. who listens to me when I have something to say.	A	B	C	D
33. who believes that I will be a success.	A	B	C	D

At school, ...

	<u>Not At All True</u>	<u>A Little True</u>	<u>Pretty Much True</u>	<u>Very Much True</u>
34. I do interesting activities.	A	B	C	D
35. I help decide things like class activities or rules.	A	B	C	D
36. I do things that make a difference.	A	B	C	D

Next are questions about violence, safety, harassment, & bullying on school property.

37. **How safe do you feel when you are at school?**

- a. Very safe
- b. Safe
- c. Neither safe nor unsafe
- d. Unsafe
- e. Very unsafe

38. **How safe do you feel in the cafeteria/lunchroom?**

- a. Very safe
- b. Safe
- c. Unsafe
- d. Very unsafe

39. **How safe do you feel in the hallways?**

- a. Very safe
- b. Safe
- c. Unsafe
- d. Very unsafe

40. **How safe do you feel in the locker rooms/gym?**

- a. Very safe
- b. Safe
- c. Unsafe
- d. Very unsafe

41. **How safe do you feel in the restrooms?**

- a. Very safe
- b. Safe
- c. Unsafe
- d. Very unsafe

42. **How safe do you feel in the courtyard/common areas?**
- Very safe
 - Safe
 - Unsafe
 - Very unsafe
43. **How safe do you feel when taking the bus (or walking) to and from school?**
- Very safe
 - Safe
 - Unsafe
 - Very unsafe
44. **How safe do you feel in the parking lot?**
- Very safe
 - Safe
 - Unsafe
 - Very unsafe

During the past 12 months, how many times on school property have you ...

	<u>Happened on School Property</u>			
	<u>0 Times</u>	<u>1 Time</u>	<u>2 to 3 Times</u>	<u>4 or More Times</u>
45. been pushed, shoved, slapped, hit, or	A	B	C	D
46. kicked by someone who wasn't just kidding around?	A	B	C	D
47. been afraid of being beaten up?	A	B	C	D
48. been in a physical fight?	A	B	C	D
49. had mean rumors or lies spread about you?	A	B	C	D
50. had sexual jokes, comments, or gestures made to you?	A	B	C	D
51. been made fun of because of your looks or the way you talk?	A	B	C	D
52. had your property stolen or deliberately damaged, such as your car, clothing, or books?	A	B	C	D
53. been offered, sold, or given an illegal drug?	A	B	C	D
54. been threatened or injured with a weapon (gun, knife, club, etc.)?	A	B	C	D
55. seen someone carrying a gun, knife, or other weapon?	A	B	C	D
56. been threatened with harm or injury?	A	B	C	D
57. been made fun of, insulted, or called names?	A	B	C	D

During the past 12 months, how many times on school property were you harassed or bullied for any of the following reasons? [You were **bullied** if you were shoved, hit, threatened, called mean names,

<u>0 Times</u>	<u>1 Time</u>	<u>2 to 3 Times</u>	<u>4 or More Times</u>
A	B	C	D

teased, or had other unpleasant physical or verbal things done to you repeatedly or in a severe way. It is **not bullying** when two students of about the same strength quarrel or fight.]

58. **Your race, ethnicity, or national origin**

59. **Your religion**

60. **Your gender (being male or female)**

61. **Because you are gay or lesbian or someone thought you were**

62. **A physical or mental disability**

63. **Any other reason (like the amount of money your family has, your clothes, or any other reason)**

64. **Please explain:** _____

65. **During the past 12 months, how many times did other students spread mean rumors or lies about you on the internet (i.e., Facebook™, email, instant message, Instagram, Twitter, Snapchat, Vine)?**

a. 0 times (never)

b. 1 time

c. 2–3 times

d. 4 or more times

66. **During the past 12 months, did you ever feel so sad or hopeless almost every day for two weeks or more that you stopped doing some usual activities?**

a. No

b. Yes

67. **How many questions in this survey did you answer honestly?**

a. All of them

b. Most of them

c. Only some of them

d. Hardly any

68. **If you are in a focus/option program please select your program (select one):**

○ ACCESS at Rose City Park (1-8)

- Chinese Immersion
- Experiential Learning Environment
- Japanese Immersion
- Mandarin Immersion
- Russian Immersion
- Spanish Immersion
- Special Focus - arts
- Special focus - CTE
- Special focus - history
- Special Focus - Science
- Special focus-Dual Credit
- Special focus-Environmental Studies
- Vietnamese Immersion
- Winterhaven Special focus-Math and science

69. Do you feel like your focus/option program is meeting its goals?

70. What would help you read more often for fun at home?

71. Is there is anything else you'd like to tell us about your school?

Next, we would like some background information about you.

72. How old are you?

- a. 10 years old or younger
- b. 11 years old
- c. 12 years old
- d. 13 years old
- e. 14 years old
- f. 15 years old
- g. 16 years old
- h. 17 years old
- i. 18 years old or older

73. What is your gender?

- a. Male
- b. Female
- c. Other: _____

74. Which of the following best describes you? (Mark All That Apply.)

- a. Heterosexual (straight)
- b. Gay or Lesbian or Bisexual
- c. Transgender
- d. Not sure
- e. Decline to respond

75. **What races/ethnicities do you consider yourself? Please mark all that apply.**

- **African American**

- **African**
 - Burundian
 - Eritrean
 - Ethiopian
 - Somali
 - Other African: _____

- **Other Black**
 - Caribbean Island(s): _____
 - Other Black: _____

- **American Indian/Alaska Native**
 - Alaska Native
 - Burns Paiute Tribe
 - Confederated Tribes of the Coos, Lower Umpqua & Siuslaw Indians
 - Confederated Tribes of the Grand Ronde Community of Oregon
 - Confederated Tribes of Siletz Indians
 - Confederated Tribes of the Umatilla Indian Reservation
 - Confederated Tribes of Warm Springs
 - Coquille Indian Tribe
 - Cow Creek Band of Umpqua Tribe of Indians
 - Klamath Tribes
 - Other American Indian Tribe/Nation: _____

- **Native/Indigenous to Canada Please describe:** _____

- **Asian**
 - Asian Indian
 - Burmese
 - Cambodian
 - Chinese
 - Filipino
 - Hmong
 - Japanese
 - Karen
 - Korean
 - Laotian
 - Mien
 - Nepali

- Thai
- Tibetan
- Vietnamese
- Other Asian: _____

- **Hispanic/Latino**
 - Caribbean Island(s): _____
 - Central American Country(s): _____
 - Indigenous Mexican, Central American or South American
 - Mexican
 - South American Country(s): _____
 - Other Hispanic/Latino: _____

- **Middle Eastern/North African Please describe:** _____

- **Pacific Islander**
 - Chuukese
 - Guamanian or Chamorro
 - Micronesian
 - Native Hawaiian
 - Samoan
 - Tongan
 - Other Pacific Islander: _____

- **White**
 - Romanian
 - Russian
 - Ukrainian
 - European Country(s): _____
 - Other White: _____

Optional: If you would like to share in your own words how you describe your race, origin, ethnicity, ancestry and/or Tribal affiliations, please use this space:



Board of Education

Superintendent's Recommendation to the Board

Board Meeting Date: December 9, 2014 **Executive Committee Lead:** Yousef Awwad, CPA

Department: Accounting & Payroll **Presenter/Staff Lead:** Sharie Lewis, CPA Sr.
Director of Accounting & Payroll Services

Agenda Action: _x_Resolution __x_Policy

SUBJECT: ANNUAL ADOPTION OF CASH MANAGEMENT AND INVESTMENT POLICY

BRIEF SUMMARY AND RECOMMENDATION

In order to sell the 2nd series of bonds and meet the requirements of ORS Chapter 294.135, approval of the Cash Management and Investment Policy by the Board is required. We would like the Superintendent to recommend the Board of Education to accept and approve the Cash Management and Investment Policy 8.20.010-P.

From the 1st reading on December 2nd, the Finance Office has made two technical changes to page 10 inserting "or Superintendent's designee" and reinserting the procedures for closing accounts (these changes are reflected in blue font).

BACKGROUND

State statutes restrict the maturities of investments by municipalities to 18 months unless a policy has been reviewed and commented upon by the Oregon Short Term Fund Board, and this policy has been adopted annually by the municipality's governing body. In May 2013 the District issued \$144.8 million in General Obligation Bonds as the first in a series of planned debt issuances to finance capital improvements. At that time the District anticipated that the construction timeline would exceed 18 months, and therefore created this policy and submitted it to the Oregon Short Term Fund Board for their review and comment.

The District plans to issue the remaining bond authorization as market conditions dictate, and anticipates at the time of additional issuance the construction spend timeline will also exceed 18 months, necessitating investment purchases to match the anticipated construction spend. Therefore, the adoption of 8.20.010-P will need to be completed on an annual basis. Unspent bond proceeds from the May 2013 issue were approximately \$88 million at June 30, 2014.

RELATED POLICIES / BOARD GOALS AND PRIORITIES

This Cash Management and Investment Policy will allow the district to continue to make sound, secure cash and investment decisions for the next year. With renewal of this policy the District

**Reviewed and Approved by
Superintendent**

A handwritten signature in blue ink, appearing to read "Carrie Smith".

will be allowed to match the proceeds of future Capital Bond sale(s) with the anticipated construction spend.

PROCESS / COMMUNITY ENGAGEMENT

The Cash Management Policy has been published on the district website and shared with various interest parties, mainly financial institutions. The policy was reviewed by the Oregon Short Term Fund Board at their meeting on October 13, 2011 as required by ORS Chapter 294.135. The renewed policy will be updated on the website.

ALIGNMENT WITH EQUITY POLICY IMPLEMENTATION PLAN

The financial resources of the district reflect the actual experience of the budget decisions that were made earlier in the business cycle. These budget decisions are made in alignment with the Racial Educational Equity Policy and using a racial equity lens.

BUDGET / RESOURCE IMPLICATIONS

There is no direct fiscal / budget impact as a result of adoption of this Policy. Having a valid policy allows the District to plan for future bond and debt obligations.

NEXT STEPS / TIMELINE / COMMUNICATION PLAN

The superintendent recommends that the Board of Education accept and approve Policy 8.20.010-P at the December 9, 2014 board meeting.

In order for PPS to meet the requirements of ORS Chapter 294.135 the Board is asked to approve this Policy.

Finance staff will be happy to answer Board members questions, and any comments and suggestions for improvement are valuable to us.

ATTACHMENTS

Policy 8.20.010-P
Resolution

Reviewed and Approved by Superintendent



BOARD POLICY

CASH MANAGEMENT

8.20.010-P

I. Scope and Pooling of Funds

This cash management policy applies to all cash activities and funds under the control of Multnomah County School District No. 1J (“the District”). This policy applies to the investment of operating funds, capital funds including bond proceeds, and bond reserve funds held by Portland Public Schools. This policy excludes petty cash activities.

The average size of the District’s investment portfolio approximates \$125,000,000, with an approximate seasonal high and low of \$200,000,000 and \$30,000,000 respectively. Average ranges do not include proceeds of General Long-Term Obligation Bonds, notes etc., if any.

II. General Objectives

It is the District’s policy to invest public funds not required for immediate expenditure in a manner which will provide safety of principal, maintenance of a liquid position, and the maximum return on cash invested while meeting daily cash flow demands and conforming to Oregon Revised Statutes (ORS).

The primary objectives, in priority order, of investment activities shall be safety, liquidity, and yield, with each objective discussed below.

1. Safety

Safety of principal is the foremost objective of the investment program. Investments shall be undertaken in a manner that seeks to ensure the preservation of capital in the overall portfolio. The object will be to mitigate both credit and interest rate risks.

(a) Credit Risk

The District will minimize the risk of loss due to the financial failure of the security issuer or backer, by:

- Concentrating its investments in the safest types of securities.
- Pre-qualifying the financial institutions, brokers/dealers, intermediaries, and advisers with which the District will do business.
- Diversifying the investment portfolio to minimize potential losses.
- Actively monitoring the investment portfolio holdings for changes in credit ratings and economic / market conditions.

(b) Interest Rate Risk

The District will minimize the risk of market value decline by:

- Structuring the investment portfolio so that maturing securities meet cash requirements for ongoing operations and/or capital projects, thereby avoiding the need to sell securities on the open market prior to maturity.
- Investing operating funds primarily in shorter-term securities or short-term investment pools.



BOARD POLICY CASH MANAGEMENT

8.20.010-P

2. Liquidity

The investment portfolio shall be kept sufficiently liquid to meet all operating requirements that may be reasonably anticipated. This is accomplished by structuring the portfolio so that securities mature concurrent with cash needs to meet anticipated demands (static liquidity). Since all possible cash demands cannot be anticipated, the portfolio shall consist of securities with active secondary or resale markets (dynamic liquidity). A portion of the portfolio may be placed in the Oregon Short-Term Fund, or similar investment offering next-day liquidity.

3. Yield

The investment portfolio shall be designed with the objective of attaining a market rate of return throughout budgetary and economic cycles, taking into account the investment risk constraints and liquidity needs. High returns on investments are of secondary importance compared to the safety and liquidity objectives described above. The majority of the portfolio is limited to highly-rated / low-risk securities in anticipation of earning a fair return relative to the risk being assumed. Securities shall not be sold prior to maturity, unless:

- A security with a declining credit rating may be sold early to prevent or minimize loss of principal.
- An unanticipated cash demand requires that the security be sold.
- A security swap would improve the quality, yield, or target duration of the portfolio.
 - Security swaps will be made only with specific approval of the CFO or, if absent, the CFO's designee.

III. Standards of Care

1. Prudence

The standard of prudence to be used by investment officials shall be the "prudent person" standard and shall be applied in the context of managing an overall portfolio. Investment officers acting in accordance with written procedures and this investment policy, and exercising due diligence, shall be relieved of personal responsibility.

Investments shall be made with judgment and care, under circumstances then prevailing, which persons of prudence, discretion and intelligence exercise in the management of their own affairs, not for speculation, but for investment, considering the probable safety of their capital as well as the probably income to be derived.

2. Ethics and Conflicts of Interest

Officers and employees involved in the investment process shall refrain from personal business activity that could conflict with the proper execution of the investment program, or that could impair their ability to disclose any material interest in financial institutions that conduct business with the District. They shall further disclose any personal / financial / investment positions that could be related to the performance of the investment portfolio.



BOARD POLICY CASH MANAGEMENT

8.20.010-P

Employees, officers and their families shall refrain from undertaking personal business transactions with the same individual with whom business is conducted on behalf of the District. Officers and employees shall, at all times, comply with the State of Oregon Government Standards and Practices code of ethics set forth in ORS Chapter 244.

3. Responsibility

The District's Board delegates, through the Superintendent to the chief financial officer (CFO), the responsibility for implementing this policy.

Day-to-day administration of this investment policy shall be managed by the CFO and delegated to his / her designee. The CFO or designee, hereinafter referred to as Investment Officer, shall act in accordance with established written procedures and internal controls for the operation of the investment program consistent with this investment policy. Procedures should include references to: safekeeping, delivery vs. payment, investment accounting, repurchase agreements, wire transfer agreements and collateral/depository agreements. No person may engage in an investment transaction except as provided under the terms of this policy and the procedures established by the Investment Officer. The Investment Officer shall be responsible for all transactions undertaken and shall establish a system of controls to regulate activities of subordinate officials.

IV. Safekeeping and Custody

1. Authorized Financial Dealers and Institutions

A list will be maintained of approved financial institutions authorized to provide investment and safekeeping services. In addition, a list will also be maintained of approved security brokers / dealers selected by creditworthiness and other factors considered relevant by the District. These may include "primary" dealers or regional dealers that qualify under the Securities and Exchange Commission (SEC) rule 15d3-1 (uniform net capital rule). Qualified dealers and brokers will be required to maintain an office in the states of Oregon or Washington. The District will limit all security purchases to institutions on these approved lists. All financial institutions and broker / dealers who wish to qualify for District investment transactions must supply the following, as appropriate:

- Audited financial statements.
- Proof of Financial Industry Regulatory Authority (FINRA) certification.
- Proof of state registration.
- Certification of having read and understood the District's investment policy.
- Certification of agreement to comply with the District's investment policy.

The Investment Officer will conduct an annual review of the financial condition and registration of qualified financial institutions and broker / dealers.

V. Internal Controls

The Investment Officer is responsible for establishing and maintaining an adequate internal control structure designed to reasonably protect the assets of the District from loss, theft or misuse. The concept of reasonable assurance recognizes that (1) the cost of a control should not



BOARD POLICY CASH MANAGEMENT

8.20.010-P

exceed the benefits likely to be derived and (2) the valuation of costs and benefits requires estimates and judgments by management.

Accordingly, the Investment Officer shall establish a process for an annual independent review by an external auditor to assure compliance with policies and procedures. The internal controls shall address the following points:

1. Accounting Method

The District shall comply with all required legal provisions and Generally Accepted Accounting Principles (GAAP) relating to investment accounting. These accounting principles are contained in the pronouncements of authoritative bodies including but not necessarily limited to, the Governmental Accounting Standards Board (GASB); the American Institute of Certified Public Accountants (AICPA); and the Financial Accounting Standards Board (FASB).

2. Delivery and Safekeeping

The purchase and sale of securities, repurchase agreements and guaranteed investment contract transactions shall be settled on a delivery-versus-payment basis (DVP) in accordance with ORS 294.145(4), ORS 294.145(5) and GFOA recommended practices. It is the District's intent that all purchased securities shall be delivered to the District's third-party custodian in the account name of the District. Sufficient evidence to title shall be consistent with modern investment and commercial practices.

3. Collateralization

All bank deposits, time deposits, certificates of deposit, and savings accounts shall be held in qualified Oregon depositories and collateralized in accordance with ORS Chapter 295.

ORS 294.035(3)(j) requires repurchase agreements be limited in maturity to three years and priced according to the written policy of the Oregon Investment Council or the Oregon Short-Term Fund Board. On March 12, 1996, the OSTF Board adopted the following margins:

- US Treasuries: 102%.
- US Agency discount and coupon securities: 102%.
- Mortgage-backed securities, although allowed by ORS Chapter 294, are not allowed as repurchase agreement collateral under this policy.

Prior to entering into any repurchase agreement, a signed Master Repurchase Agreement must be in place between the District and the securities dealer. At a minimum, the District will monitor the collateral requirements weekly for guaranteed investment contracts.

4. Pooling of Funds

Except for cash in certain restricted and special funds, the District will consolidate cash balances from all funds to maximize investment earnings. Investment income will be allocated to the various funds based on their respective participation and in accordance with GAAP.



BOARD POLICY CASH MANAGEMENT

8.20.010-P

VI. Suitable and Authorized Investments

The following investments will be permitted by this policy and are authorized for investment under ORS 294.035, ORS 294.046, ORS 294.052, ORS 294.805 and 294.810:

1. US. Treasury securities and other lawfully issued general obligations of the United States, including general obligations of agencies and instrumentalities of the United States or enterprises sponsored by the United States government.
2. Debt of the agencies and instrumentalities of the states of Oregon, California, Idaho and Washington and their political subdivisions.
3. Time deposit open accounts, certificates of deposit, share accounts and savings accounts.
4. Banker's acceptances.
5. Corporate indebtedness.
6. Repurchase Agreements.
7. Oregon Short-term Fund, also known as Local Government Investment Pool ("LGIP").
8. The District may invest up to 100% of the proceeds from any bond issue in investment agreements that meet the requirements of ORS 294.052 and the repurchase agreement collateral requirements and restrictions of this policy.
9. Demand checking accounts are excluded from this policy scope.

VII. Investment Parameters

1. Diversification

Investments shall be diversified by:

- Limiting investments to avoid over-concentration in securities from a specific issuer or business sector (excluding U.S. Treasury securities);
- Investing in securities that have high credit quality;
- Limiting investments in securities with high interest-rate risk, such as variable-rate securities;
- Investing in securities with varying maturities; and
- Continuously investing a portion of the portfolio in readily-available funds such as the Oregon Short-Term Fund (or LGIP).

2. Maximum Maturities and Percentage of Investments by Type

The maximum percentages for direct investments of surplus funds are as shown in the chart below. Surplus funds are defined as the sum of all investments, cash balances, deposit balances of all types, and LGIP balances. The maximum maturity is measured from the settlement date of the investment transaction.

Capital project funds are funds specifically dedicated to capital projects, and will typically include proceeds from the District's bond sales. All bond fund reserves will be considered to be capital project funds. With Board approval, the District may designate other funds as capital project funds. Operating funds are all surplus funds that are not capital project funds.



BOARD POLICY
CASH MANAGEMENT

8.20.010-P

Per subsection 4 of this section, Credit Ratings, minimum ratings are required on certain investments pursuant to ORS 294.035.

Security	Maximum % Of Total Portfolio	Maximum Maturity
US Treasury Bills, Notes and Bonds, and Obligations secured by the US Treasury	100%	18 months for operating funds; 5 years for capital project funds
US Government Agencies and Instrumentalities, including Government-Sponsored Enterprises	100%	18 months for operating funds; 5 years for capital project funds
State and Local Government Securities	30%	18 months for operating funds; 5 years for capital project funds
Time Certificates of Deposit	50%	18 months
Repurchase Agreements	25%	30 days
Bankers Acceptances	25%	6 months
Corporate Indebtedness (commercial paper and bonds)	35%	18 months
OSTF – Local Government Investment Pool	Pool Limit	Pool Maximum

In order to achieve issuer diversification, this policy sets limits on the maximum holdings by issuer for certain investment types.

- There shall be a limit of 50% of the portfolio held in securities issued by any single US government agency.
- Time certificates of deposit and bankers acceptances can all be issued by a single banking institution. In order to avoid over-concentration in a single banking institution, there shall be a limit of 10% for overall holdings in one institution.



BOARD POLICY CASH MANAGEMENT

8.20.010-P

In addition to this policy, ORS 294.035 limits investments in corporate indebtedness to 35% of the total investment portfolio, with no more than 5% of total funds invested in a single corporate entity and its affiliates or subsidiaries.

Due to fluctuations in the aggregate surplus funds balance, maximum percentages for a particular issuer or investment type may be exceeded at a point in time subsequent to the purchase of a particular security. Securities need not be liquidated to realign the portfolio; however, consideration should be given to this matter when future purchases are made.

3. Liquidity of Funds

Because of inherent difficulties in accurately forecasting cash flow requirements, a portion of the portfolio should be continuously invested in readily available funds, such as OSTF or overnight repurchase agreements, or held in bank balances to ensure sufficient liquidity to meet ongoing obligations.

Maturity limitations will depend upon whether the funds being invested are considered short- or long-term funds. Surplus funds will be considered operating funds, except those reserved for capital projects. Except for special situations, as directed by the Investment Officer, investments will be limited to maturities not exceeding 18 months.

Short-term portfolio investment maturities for operating funds shall be scheduled to coincide with projected cash flow needs. In addition, the following maturity limits are designed to ensure liquidity in the portfolio:

Length of Maturity	Minimum % of Total Portfolio
Under 30 days	10%
Under 90 days	25%
Under 365 days	90%
Under 18 months	100%

If these maturity limits are inadvertently exceeded at the time of a specific investment, the purchase does not need to be liquidated. However, subsequent investments must not be made to longer maturity dates until the limits will be met.

The investments of bond proceeds are restricted under bond covenants that may be more restrictive than the investment parameters included in this policy. Bond proceeds shall be invested in accordance with the parameters of this policy, the applicable bond covenants or applicable tax laws, whichever are most restrictive.

This investment policy was submitted to and approved by the OSTF Board as specified above and in accordance with ORS 294.135(1)(a).

4. Credit Ratings



BOARD POLICY CASH MANAGEMENT

8.20.010-P

Minimum credit rating levels for permissible investments are set out in ORS 294.035. The District will only recognize ratings of Moody's, S&P, and Fitch of the available Nationally-Recognized Statistical Rating Organizations (NRSROs). These credit rating levels apply to the security at the transaction settlement date. If a security's credit rating is subsequently

downgraded below the minimum rating level for a new investment of that security, the Investment Officer shall evaluate, on a case-by-case basis, in order to determine if the security should be held or sold. The Investment Officer shall notify the CFO or his/her designee about the credit rating downgrade and whether the decision was made to sell or hold the security.

5. **Securities Lending and Reverse Repurchase Agreements**

The District shall not lend securities nor directly participate in a securities lending or reverse repurchase program.

6. **Bids and Offers**

Before any security purchase or sale is initiated, the Investment Officer shall determine the appropriateness of seeking competitive bids or offers. Information about current market interest rate levels can be obtained from various sources, including investment dealers, financial websites and publications, and other sources. Factors to consider include where the securities are held, the size of the transaction, and the term to maturity.

In the event competitive bids or offers are not considered, the decision not to do so shall be documented. When required by applicable tax laws or bond covenants, competitive bids and offers shall be sought for security purchases and sales of bond funds.

VIII. **Reporting**

1. **Methods**

The Investment Officer shall prepare a quarterly report, including a management summary that provides an analysis of the status of the current investment portfolio and transactions made over the last period. This management summary will be prepared in a manner which will allow the District to ascertain whether investment activities during the reporting period have conformed to this policy. The report shall be provided to the Board at least annually in accordance with ORS 294.155 and more frequently as the Board requests. The report will include the following:

- List of transactions occurring during the reporting period.
- List of individual securities held at the end of the reporting period.
- Average weighted yield to maturity of portfolio on investments as compared to applicable benchmark(s).
- List of investments by maturity date (or call date, as appropriate).
- Percentage of the total portfolio that each type of investment represents along with the percentages authorized in this policy.
- Performance relative to benchmark(s).



BOARD POLICY CASH MANAGEMENT

8.20.010-P

2. Performance Standards

The investment portfolio will be managed in accordance with the parameters specified within this policy. The performance of the District's portfolio shall be measured against the performance of the Oregon Short-Term Fund, 90-day agencies, and 90-day treasuries. The average monthly net yield of the District's portfolio shall be used for such comparison or evaluation. Because bond proceeds are expected to be invested at the time they are received, and are therefore invested in the interest rate environment that exists at that point in time, that portion of the portfolio will be excluded from ongoing benchmark performance measurement.

3. Mark to Market

The market value of the portfolio shall be calculated, and a statement of the market value of the portfolio issued, at least monthly. This will ensure that review of the investment portfolio, in terms of value and price volatility, has been performed consistent with the GFOA Recommended Practice on "Mark to Market Practices for State and Local Government Investment Portfolios and Investment Pools". This "Mark to Market" analysis is provided by the District's third-party investment custodial safekeeping agent.

IX. Administration of Cash Management Program

1. Objectives.

The District's objectives are to comply both with the letter and the spirit of Board policy in a manner that permits efficient use of District resources and effective management control.

2. Deposits.

All District monies from all sources, however small in amount, are to be deposited daily into the designated bank account.

Arrangements shall be made to have large amounts of money, such as bond settlements and recurring receipts, received via wire / ACH transfers.

3. Payments.

All payments shall be made when approved and due, but not before they are due. Cash discounts will be analyzed to determine the cost/benefit of payment terms in relation to investment opportunities. No payments of any kind will be made from un-deposited cash.

4. Commitments.

Purchase commitments shall be made so that the time between receipt of items and services and the need for these items and services is minimized and monies are therefore not prematurely removed from investment availability.

5. Cash Flow.

A cash flow projection is to be prepared at the start of each fiscal year, indicating planned cash receipts and disbursements by month. This projection shall be approved by the CFO.



BOARD POLICY CASH MANAGEMENT

8.20.010-P

6. Daily Cash Control.

The District's staff is to account for cash balances daily, by financial institution.

X. Administration of Cash Management Program

Banking services will be engaged by the District based ~~solely~~ on considerations of availability of required services, cost of those services, and any applicable legal requirements. Banking services will be engaged based on an open bidding process conducted at least once every ten (10) years and reviewed annually for continuing validity. The District will use one bank as its primary depository institution. The District may use different banks or financial institutions for investment purposes than those used for depository purposes.

XI. District Bank Account Administration

The CFO or Superintendent's designee is the only officer with authority to direct a bank to open or close ~~or close~~ an account, ~~and any additions of new, or deletions of existing, bank accounts will be at his / her direction.~~

All District bank accounts will have at least two authorized signers at all times. Student Body Accounts will require two original physical signatures on all checks, while disbursements from the District's primary accounts (Accounts Payable, Payroll, Risk Management) may be issued with electronic signature (ORS 294.129). ~~The CFO's is the only authorized electronic signature.~~

XII. Policy Adoption and Re-Adoption

This investment policy shall be reviewed on an annual basis by the Investment Officer, who shall submit the policy and proposed revisions to the OSTF if required. The policy and any revisions shall be presented annually to the Portland Public Schools Board of Education, which will review and approve the investment policy, and any revisions, annually.

END OF POLICY

Legal References:

ORS Chapters 244, 294 and 295



Board of Education

Staff Report to the Board

Board Meeting Date: January 6, 2015

Executive Committee Lead: Sean Murray

Department: Human Resources

Presenter/Staff Lead: Terri Burton

SUBJECT: Portland Public Schools Cafeteria Plan Fourth Amendment

BACKGROUND:

The primary purpose of these amendments to the Cafeteria plan and board policy is to align them with new health care reform/ IRS rules and make certain housekeeping rule changes. These amendments were advised and prepared by district legal counsel, Miller Nash, and are generally effective February 1, 2015.

RELATED POLICIES / BOARD GOALS AND PRIORITIES:

5.10.090-P Cafeteria Plan Board Policy and Plan documents will align legally with IRS and health care reform rules by:

- Adding new mid-year election change events for group health plans regarding employee opportunities to enroll mid-year for enrollment in health care exchanges due to reduction in hours or desire to enroll in exchanges during exchange open enrollment, which does not align with PPS open enrollment times;
- Cost-of-living adjustments are being made to the health flexible spending account (FSA) plans and clarity added to \$20 monthly contribution minimum;
- Language was added to specify a claimant must exhaust the Plan's claims procedure before filing suit for benefits and added one year limitation period during which a claimant can file a suit;
- Added 2015 contribution limits to health savings account (HSA), which is offered to OEGB employees only; and
- The cash out amount for waiving coverage, offered to OEGB employees only, was updated to match practice.

In addition, the PacificSource FSA provider contract and plan documents will be amended to align with these changes.

PROCESS / COMMUNITY ENGAGEMENT:

These amendments are being made at the advice and recommendation of Miller Nash.

ALIGNMENT WITH EQUITY POLICY IMPLEMENTATION PLAN:

Provides additional access to health care exchange plans to employees whose hours are reduced or the health care exchange would offer a more affordable plan for them and their families. We believe many PPS employees also have children who attend PPS schools and these changes could favorably affect those students' health and family financial well-being.

RESOURCE IMPLICATIONS:

There should be no budgetary impact.

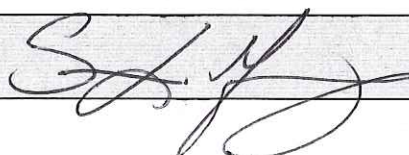
NEXT STEPS / TIMELINE / COMMUNICATION PLAN:

January 6, 2015 School Board meeting for discussion
January 13, 2015 School Board meeting for reading
February 3, 2015 School Board meeting for approval.

ATTACHMENTS:

- Board resolution draft
- Clean copy Cafeteria Plan Fourth Amendment
- Marked Cafeteria Plan document

Reviewed and Approved by
Executive Committee Lead

 12/23/14

Portland Public School District 1st Reading

DATE: January 6, 2015

Public Comment for: Revision of Policy 5.10.090-P (Cafeteria Plan)

The Portland Public School District is providing Notice of Proposed Policy and Public Comment to offer interested parties reasonable opportunity to submit data or comments on the proposed policies noted below.

Public comment may be submitted in writing directly to the district or through the district Web site noted below. Written comments must be submitted by 5:00 p.m. on the Last Date for Comment listed below.

1st Reading by: Pam Knowles, Co-Chair, Portland Public School Board
Summary: Proposed Revision of Policy 5.10.090-P (Cafeteria Plan)

Draft Policy Web Site:

<http://www.pps.k12.or.us/departments/board/872.htm>

(click on draft policy link).

Recommended for 1st Reading by: Board of Education

Policy Contact: Rosanne Powell, Senior Board Office Manager

Last Date for Comment: January 27, 2015

Address: P.O. Box 3107, Portland, OR 97208-3107

Telephone: 503-916-3741

E-mail: schoolboard@pps.net

Last Date for Comment: January 27, 2015

**PORTLAND PUBLIC SCHOOLS
CAFETERIA PLAN**

FOURTH AMENDMENT

PARTIES

This Fourth Amendment is adopted, effective February 1, 2015, by the School District No. 1, Multnomah County, Oregon (“District”).

RECITALS

The District established the Portland Public Schools Cafeteria Plan (the “Plan”) effective May 1, 1994.

The Plan was last amended and restated effective January 1, 2006, and was last amended effective October 1, 2013.

The District intends that this Plan continue to satisfy the requirements of Section 125 of the Internal Revenue Code of 1986, as amended.

The District wishes to amend the Plan in certain respects.

AMENDMENT

The PORTLAND PUBLIC SCHOOLS CAFETERIA PLAN is hereby amended, effective February 1, 2015, or as of such earlier or later dates as indicated below or as provided herein, as set forth on the pages attached hereto, which are incorporated herein by reference as follows:

1. ARTICLE 4—PARTICIPATION

4.3(i) is added at pages 14 and 14a.

2. ARTICLE 5—CREDITS AND REIMBURSEMENT PROCEDURES

5.3 at pages 16 and 16a.

3. ARTICLE 6—CLAIMS PROCEDURE

6.5 at page 18.

4. ARTICLE 9—HEALTH CARE REIMBURSEMENT ACCOUNT
PROGRAM

9.2 at page 22.

5. ARTICLE 10—DENTAL AND VISION CARE REIMBURSEMENT
ACCOUNT PROGRAM

10.2 at page 28b.

6. ARTICLE 12—HEALTH SAVINGS ACCOUNT

12.2 at page 30a.

7. EXHIBIT B at page B-1.

8. EXHIBIT C at page C-1.

The District has caused this amendment to be executed by its duly authorized representative as of the date indicated below.

**SCHOOL DISTRICT NO. 1,
MULTNOMAH COUNTY, OREGON**

By: _____

Print Name: _____

Date: _____

(g) Cessation of Required Contributions. Except as otherwise provided in 5.4 with respect to eligible Dependent Care Expenses, a benefit will cease to be provided to a Participant if the Participant fails to make the required premium payments with respect to the benefit (e.g., a Participant ceases to make premium payments for health care reimbursement account program coverage after a termination of employment). However, in such case, the former Participant may not again make a new benefit election for the remaining portion of the Plan Year.

(h) HSA Election Changes. A Participant's election to make pre-tax Compensation reduction contributions to an HSA can be prospectively changed on a monthly basis. Only one election change may be made per month. HSA contribution elections can be prospectively revoked if the Participant becomes ineligible to make HSA contributions. If HSA contributions are changed, the contribution amounts must continue to satisfy the HSA contribution limits described in Article 12. Election changes or revocations will be effective beginning with the payroll period during which the election change or revocation is received by the Plan Administrator (provided that the Compensation for that payroll period has not become currently available), unless the Participant elects a later effective date.

(i) Additional Group Health Plan Election Changes. A Participant may prospectively revoke an election of coverage under a group health plan that provides minimum essential coverage (as defined in Code Section 5000A(f)(1)) if either (1) or (2) below is satisfied. This 4.3(i) does not allow election changes with respect to the Health Care Expense Reimbursement Benefit described in 4.1(b) or the Dental and Vision Care Expense Reimbursement Benefit described in 4.1(c).

(1) Reduction in Hours of Service. An election change may be made due to a reduction in hours if both (A) and (B) are satisfied.

(A) The Participant was in an employment status under which he or she was reasonably expected to average at least 30 hours of service a week and the Participant's status is changed so that he or she will reasonably be expected to average less than 30 hours of service a week.

(B) The revocation of the election of coverage under the group health plan corresponds to the intended enrollment of the Participant, and any related individuals who cease coverage due to the revocation, in another plan that provides minimum essential coverage. The new coverage must be effective no later than the first day of the second month following the month in which the original coverage was revoked.

(2) Enrollment in a Qualified Health Plan Through an Exchange.

An election change may be made due to enrollment in a qualified health plan if both (A) and (B) are satisfied.

(A) The Participant is eligible for a special enrollment period (as provided in 45 CFR § 155.420(d)) to enroll in a qualified health plan through an exchange established under Section 1311 of the Patient Protection and Affordable Care Act or the Participant seeks to enroll in a qualified health plan through an exchange during the exchange's annual open enrollment period.

(B) The revocation of the election of coverage under the group health plan corresponds to the intended enrollment of the Participant, and any related individuals who cease coverage due to the revocation, in a qualified health plan through an exchange. The new coverage must be effective no later than the day immediately following the last day of the original coverage that is revoked.

(f) **Unused Amounts.** An amount remaining in an Account after the Participant has submitted all reimbursable expenses for the Plan Year of the type for which the Account is established, shall not be carried over to a subsequent Plan Year, nor shall such amount be paid, directly or indirectly, to the Participant in cash or in the form of any other benefit.

5.2 Reimbursement Payment Procedures. The following rules shall govern the reimbursement of a Participant's eligible expenses under the Health Care Expense Reimbursement Benefit, the Dental and Vision Care Expense Reimbursement Benefit, and the Dependent Care Expense Reimbursement Benefit.

(a) **Reimbursement Request.** The Participant shall submit a written request for reimbursement on the form or forms provided by the Plan Administrator. Requests for reimbursement shall be made at such time or times as specified by the Plan Administrator; however, eligible expenses incurred during a Plan Year must be submitted for reimbursement not later than three months after the close of the Plan Year. Eligible expenses that are not submitted on a timely basis in accordance with this 5.2(a) shall not be reimbursed.

(b) **Documentation.** A Participant's written request for reimbursement shall establish that the expense was incurred during the applicable time period, and must state that the amount has not been reimbursed and is not reimbursable under any other health plan or dependent care plan, and that the amount will not be used in connection with a deduction or credit on the Participant's federal income tax return. No advance reimbursement may be made of future or projected expenses. The written request must be accompanied with a written statement from an independent third party stating that the expense has been incurred and the amount of such expense.

(c) **Payment.** A Participant's request for reimbursement, when approved by the Plan Administrator, shall be paid as soon as reasonably practicable following such approval. Payments shall only be made in reimbursement to a Participant and shall not be made directly to a service provider. Except as provided in 5.1(e), reimbursements to a Participant shall not exceed the amount available in the Participant's Account for the type of expense for which reimbursement is requested.

5.3 Amount of Elective and Nonelective Contributions. The maximum amount of nonelective contributions available to any Participant under this Plan for a Plan Year shall equal the District contributions under 5.1(c). The maximum amount of elective contributions available to any Participant under this Plan for a Plan Year shall equal the annual amount of the Participant's share of the cost of the District-provided group health plan premiums for the Premium Payment Benefit, plus \$20,000.

The minimum amount of elective contributions that may be elected by any Participant **under the health care reimbursement account program, the dental and vision care reimbursement account program, and the dependent care reimbursement account**

program shall be \$20 per month **for each program**. The maximum amount for credit to the Participant's HSA is as described in Article 12.

Notwithstanding the foregoing, the maximum amount of salary reduction contributions available to any Participant under this Plan for a Plan Year for the health care reimbursement account program or dental and vision care reimbursement account program shall equal \$2,500 (plus cost-of-living adjustments permitted under applicable law) **(\$2,550 for Plan Years beginning on or after January 1, 2015)**, prorated for any short Plan Year.

5.4 Expense Reimbursement After Participation Terminates. If, during a Plan Year, a Participant terminates employment, transfers to an ineligible class of employees, or ceases to make required contributions, he or she may nevertheless submit eligible Dependent Care Expenses incurred during the remainder of that Plan Year to the Plan Administrator for reimbursement under the dependent care reimbursement account program.

If a Participant terminates employment with the District or transfers to an ineligible class of employees and revokes his or her existing benefit elections, the Plan Administrator shall reimburse the Participant for any amount previously paid for coverage or benefits under the health care reimbursement account program or dental and vision care reimbursement account program relating to the period after the termination or transfer.

5.5 Qualified Reservist Distributions. Notwithstanding any other Plan provision to the contrary, a Participant may request a qualified reservist distribution from the Participant's health care reimbursement Account or dental and vision care reimbursement Account. The term "Account" as used in this 5.5, refers only to the foregoing two Accounts.

(a) Definition of Qualified Reservist Distribution. A qualified reservist distribution is a distribution to a Participant of all or a portion of the balance in the Participant's Account if: (1) the Participant is a qualified reservist as defined in (b) below, and (2) the request for a distribution is made during the period specified in (e) below.

(b) Definition of Qualified Reservist. A qualified reservist is a Participant who is, by reason of being a member of a reserve component (as defined in 37 U.S.C. § 101), ordered or called to active duty for a period of 180 days or more or for an indefinite period. The Plan Administrator may rely on the order or call to determine the period of active duty. If the order or call specifies that the period is for 180 days or more or is indefinite, the Participant is a qualified reservist, even if the actual period of active duty is less than 180 days or is otherwise changed. If the period of active duty specified in the order or call is less than 180 days, the Participant is not a qualified reservist unless subsequent calls or orders increase the total period of active duty to 180 days or more.

(c) Amount Available. The amount available as a qualified reservist distribution is the amount contributed to the Participant's Account as of the date of the request for distribution minus reimbursements received from the Account as of the date of the request.

time after receipt of the request for review. The written decision shall include the reasons for such decision with reference to the provisions of the Plan upon which the decision is based. The decision shall be final and binding upon the Claimant, the District, and all other persons involved.

6.5 Further Review. The Claimant must follow and exhaust the claims procedure described in this article before he or she can file suit for benefits. In no event may the Claimant file suit for benefits more than one year from the date on which the decision on review under 6.4 is sent to the Claimant.

The scope of any subsequent review of the benefit claim, judicial or otherwise, shall be limited to a determination as to whether the Plan Administrator acted arbitrarily or capriciously in the exercise of its discretion. In no event shall any such further review be on a de novo basis as the Plan Administrator has discretionary authority to determine eligibility for benefits and to construe the terms of this Plan.

ARTICLE 9

HEALTH CARE REIMBURSEMENT ACCOUNT PROGRAM

9.1 General. This article is intended to qualify as an accident and health plan within the meaning of Code Section 106. It is intended that reimbursements under this program be eligible for exclusion from the gross income of Participants under Code Section 105(b). Accordingly, this program shall be interpreted and construed in accordance with Code Sections 106 and 105(e) and any regulations or other interpretations thereunder. This program represents one benefit that may be elected by Participants under the Portland Public Schools Cafeteria Plan, and a Participant under that Plan who elects the Health Care Expense Reimbursement Benefit thereunder is deemed to be a Participant under this health care reimbursement account program.

9.2 Amount of Coverage. ~~For each Plan Year, a Participant may elect any whole dollar amount of coverage under this health care reimbursement account program up to \$3,000.~~

~~Notwithstanding the foregoing, the~~ **The** maximum amount of coverage that may be elected as a salary reduction contribution under this health care reimbursement account program for a Plan Year is limited to \$2,500 (plus cost-of-living adjustments permitted under applicable law) **(\$2,550 for Plan Years beginning on or after January 1, 2015)**, prorated for any short Plan Year.

9.3 Health Care Expenses. Each Participant under this health care reimbursement account program will be entitled to receive for each Plan Year reimbursements of Health Care Expenses that are incurred during the Plan Year and that are not paid or reimbursed by insurance or otherwise, up to the dollar amount of coverage elected by the Participant for that Plan Year.

There will be no reimbursement for premiums paid by a Participant for health insurance. For example, there will not be any reimbursement for premiums paid for other health plan coverage, including premiums paid for health coverage under a plan maintained by the employer of the Participant's spouse or Dependent.

Health Care Expenses incurred after December 31, 2010, for medicines or drugs may be reimbursed under this health care reimbursement account program only if the medicine or drug (a) requires a prescription, (b) is available without a prescription (i.e., an over-the-counter medicine or drug) and the individual obtains a prescription, or (c) is insulin.

The coverage elected for a Plan Year is available only to reimburse expenses that are incurred during the Plan Year. An expense shall be treated as having been incurred when the medical, dental, or vision care that gives rise to the expense is provided or at the time the equipment, supplies, or drugs that give rise to the expense are purchased, and not when the Participant is formally billed, charged for, or pays for the expense.

ARTICLE 10

DENTAL AND VISION CARE REIMBURSEMENT ACCOUNT PROGRAM

10.1 General. This article is intended to qualify as an accident and health plan within the meaning of Code Section 106. It is intended that reimbursements under this program be eligible for exclusion from the gross income of Participants under Code Section 105(b). Reimbursements under this program are limited to expenses that qualify as dental or vision care under Code Section 223(c). Accordingly, this program shall be interpreted and construed in accordance with Code Sections 106, 105(e), and 223 and any regulations or other interpretations thereunder. This program represents one benefit that may be elected by Participants under the Portland Public Schools Cafeteria Plan, and a Participant under that Plan who elects the Dental and Vision Care Expense Reimbursement Benefit thereunder is deemed to be a Participant under this dental and vision care reimbursement account program.

10.2 Limitations. The maximum amount of coverage that may be elected as a salary reduction contribution under this dental and vision care reimbursement account program for a Plan Year shall equal \$2,500 (plus cost-of-living adjustments permitted under applicable law) **(\$2,550 for Plan Years beginning on or after January 1, 2015)**, prorated for any short Plan Year.

10.3 Dental and Vision Care Expenses. Each Participant under this dental and vision care reimbursement account program will be entitled to receive for each Plan Year reimbursements of Dental and Vision Care Expenses that are incurred during the Plan Year and that are not paid or reimbursed by insurance or otherwise, up to the dollar amount of coverage elected by the Participant for that Plan Year.

There will be no reimbursement for premiums paid by a Participant for any kind of health insurance. For example, there will not be any reimbursement for premiums paid for other dental plan coverage, including premiums paid for dental coverage under a plan maintained by the employer of the employee's spouse or Dependent.

Dental and Vision Care Expenses incurred for medicines or drugs may be reimbursed under this dental and vision care reimbursement account program only if the medicine or drug (a) requires a prescription, (b) is available without a prescription (i.e., an over-the-counter medicine or drug) and the individual obtains a prescription, or (c) is insulin.

The coverage elected for a Plan Year is available only to reimburse expenses that are incurred during the Plan Year. An expense shall be treated as having been incurred when the dental or vision care that gives rise to the expense is provided or at the time the equipment, supplies, or drugs that give rise to the expense are purchased, and not when the Participant is formally billed, charged for, or pays for the expense.

ARTICLE 12

HEALTH SAVINGS ACCOUNT

12.1 General. An Eligible Employee may elect to make pre-tax Compensation reduction contributions to an HSA under 4.1(e) subject to the terms of Article 3 and this article. To make such contributions, the Eligible Employee must (a) be an “eligible individual” within the meaning of Code Section 223(c), (b) be covered by an HDHP coverage option provided by the District, and (c) have established an HSA account with an HSA trustee/custodian satisfactory to the Plan Administrator. If an Eligible Employee elects the Health Savings Account Benefit, the District will contribute to the Eligible Employee’s HSA, subject to the Eligible Employee’s continuing eligibility to contribute to an HSA, an amount as determined by the District and listed on Exhibit C. In no event will an Eligible Employee be allowed to receive such District contribution as a Cash Benefit.

12.2 Maximum Amount of Contributions. In no event shall the annual amount of the Participant's pre-tax Compensation reduction contributions and the District Contributions to the Participant’s HSA exceed the annual limit described in Code Section 223(b). The limit is the annual statutory maximum under Code Section 223(b), as adjusted for cost-of-living increases (~~\$3,250~~**3,350** for single HDHP coverage and ~~\$6,450~~**6,650** for family HDHP coverage in ~~2013~~**2015**), plus additional catch-up contribution amounts for Participants who are age 55 or older as described in Code Section 223(b)(3) (\$1,000 for ~~2013~~**2015**).

Subject to the following, if the Participant is not eligible to contribute to an HSA for the entire Plan Year under this Article 12, the maximum annual contribution will be prorated for the number of months in which the Participant is eligible to contribute to an HSA. If a Participant is eligible to make HSA contributions during the last month of a Plan Year, however, the Participant’s maximum annual HSA contribution for the Plan Year is the greater of the following:

- (a) The prorated amount described in the preceding sentence; or
- (b) The maximum annual HSA contribution under Code Section 223(b)(2)(A) or 223(b)(2)(B) based on the Participant’s HDHP coverage (self-only or family) December 1 of that Plan Year, plus catch-up contributions under Code Section 223(b)(3), if applicable.

12.3 Forwarding of Contributions. The District will forward contributions to the Participant’s HSA that the Participant has established with an HSA custodian or trustee. The Plan Administrator may limit the number of HSA providers to whom it will forward HSA contributions.

12.4 Status of HSA. The HSA Benefit under this Plan consists solely of the Participant’s ability to make pre-tax Compensation reduction contributions to the HSA and the District contributions that are made to the HSA. The terms and conditions of each Participant’s HSA are described in the HSA trust or custodial agreement provided by the applicable trustee or custodian and are not a part of this Plan.

**EXHIBIT B
PORTLAND PUBLIC SCHOOLS
CAFETERIA PLAN**

**Cash Out of District Contribution
(Referent Section 4.1(d))**

A Participant for whom the Plan Year under Exhibit A would be October 1 through September 30 shall be entitled to \$~~200~~**275** in taxable cash compensation in each month in which he or she elects not to receive (and does not receive) coverage under the District's medical, dental, and vision plans, provided the Participant demonstrates to the Plan Administrator's satisfaction that he or she has coverage under another group medical plan, including a government provided basic medical plan.

**EXHIBIT C
PORTLAND PUBLIC SCHOOLS
CAFETERIA PLAN**

**District Contribution
(Referent Section 5.1(c))**

The amount of the District monthly contribution for each Plan Year for each Participant shall be the District's share of the premium for coverage under the District-provided group health plans.

The District will contribute the following additional amount for each Eligible Employee who elects the Health Savings Account Benefit described in 4.1(e): (1) ~~\$125~~**150** per month for an Eligible Employee enrolled in self-only coverage under a District-provided HDHP option, or (2) ~~\$250~~**275** per month for an Eligible Employee enrolled in family coverage under a District-provided HDHP option.



BOARD POLICY
CAFETERIA PLAN

5.10.090-P

PORTLAND PUBLIC SCHOOLS
CAFETERIA PLAN

FOURTH AMENDMENT

P A R T I E S

This Fourth Amendment is adopted, effective February 1, 2015, by the School District No. 1, Multnomah County, Oregon (“District”).

R E C I T A L S

The District established the Portland Public Schools Cafeteria Plan (the “Plan”) effective May 1, 1994.

The Plan was last amended and restated effective January 1, 2006, and was last amended effective October 1, 2013.

The District intends that this Plan continue to satisfy the requirements of Section 125 of the Internal Revenue Code of 1986, as amended.

The District wishes to amend the Plan in certain respects.

A M E N D M E N T

The PORTLAND PUBLIC SCHOOLS CAFETERIA PLAN is hereby amended, effective February 1, 2015, or as of such earlier or later dates as indicated below or as provided herein, as set forth on the pages attached hereto, which are incorporated herein by reference as follows:

1. ARTICLE 4—PARTICIPATION

4.3(i) is added at pages 14 and 14a.

2. ARTICLE 5—CREDITS AND REIMBURSEMENT PROCEDURES

5.3 at pages 16 and 16a.

3. ARTICLE 6—CLAIMS PROCEDURE

6.5 at page 18.

4. ARTICLE 9—HEALTH CARE REIMBURSEMENT ACCOUNT PROGRAM

9.2 at page 22.

5. ARTICLE 10—DENTAL AND VISION CARE REIMBURSEMENT ACCOUNT PROGRAM

10.2 at page 28b.

6. ARTICLE 12—HEALTH SAVINGS ACCOUNT

12.2 at page 30a.

7. EXHIBIT B at page B-1.

8. EXHIBIT C at page C-1.

The District has caused this amendment to be executed by its duly authorized representative as of the date indicated below.

**SCHOOL DISTRICT NO. 1,
MULTNOMAH COUNTY, OREGON**

By: _____

Print Name: _____

Date: _____

(g) **Cessation of Required Contributions.** Except as otherwise provided in 5.4 with respect to eligible Dependent Care Expenses, a benefit will cease to be provided to a Participant if the Participant fails to make the required premium payments with respect to the benefit (e.g., a Participant ceases to make premium payments for health care reimbursement account program coverage after a termination of employment). However, in such case, the former Participant may not again make a new benefit election for the remaining portion of the Plan Year.

(h) **HSA Election Changes.** A Participant's election to make pre-tax Compensation reduction contributions to an HSA can be prospectively changed on a monthly basis. Only one election change may be made per month. HSA contribution elections can be prospectively revoked if the Participant becomes ineligible to make HSA contributions. If HSA contributions are changed, the contribution amounts must continue to satisfy the HSA contribution limits described in Article 12. Election changes or revocations will be effective beginning with the payroll period during which the election change or revocation is received by the Plan Administrator (provided that the Compensation for that payroll period has not become currently available), unless the Participant elects a later effective date.

(i) **Additional Group Health Plan Election Changes.** A Participant may prospectively revoke an election of coverage under a group health plan that provides minimum essential coverage (as defined in Code Section 5000A(f)(1)) if either (1) or (2) below is satisfied. This 4.3(i) does not allow election changes with respect to the Health Care Expense Reimbursement Benefit described in 4.1(b) or the Dental and Vision Care Expense Reimbursement Benefit described in 4.1(c).

(1) **Reduction in Hours of Service.** An election change may be made due to a reduction in hours if both (A) and (B) are satisfied.

(A) The Participant was in an employment status under which he or she was reasonably expected to average at least 30 hours of service a week and the Participant's status is changed so that he or she will reasonably be expected to average less than 30 hours of service a week.

(B) The revocation of the election of coverage under the group health plan corresponds to the intended enrollment of the Participant, and any related individuals who cease coverage due to the revocation, in another plan that provides minimum essential coverage. The new coverage must be effective no later than the first day of the second month following the month in which the original coverage was revoked.

(2) **Enrollment in a Qualified Health Plan Through an Exchange.**

An election change may be made due to enrollment in a qualified health plan if both (A) and (B) are satisfied.

(A) The Participant is eligible for a special enrollment period (as provided in 45 CFR § 155.420(d)) to enroll in a qualified health plan through an exchange established under Section 1311 of the Patient Protection and Affordable Care Act or the Participant seeks to enroll in a qualified health plan through an exchange during the exchange's annual open enrollment period.

(B) The revocation of the election of coverage under the group health plan corresponds to the intended enrollment of the Participant, and any related individuals who cease coverage due to the revocation, in a qualified health plan through an exchange. The new coverage must be effective no later than the day immediately following the last day of the original coverage that is revoked.

(f) **Unused Amounts.** An amount remaining in an Account after the Participant has submitted all reimbursable expenses for the Plan Year of the type for which the Account is established, shall not be carried over to a subsequent Plan Year, nor shall such amount be paid, directly or indirectly, to the Participant in cash or in the form of any other benefit.

5.2 Reimbursement Payment Procedures. The following rules shall govern the reimbursement of a Participant's eligible expenses under the Health Care Expense Reimbursement Benefit, the Dental and Vision Care Expense Reimbursement Benefit, and the Dependent Care Expense Reimbursement Benefit.

(a) **Reimbursement Request.** The Participant shall submit a written request for reimbursement on the form or forms provided by the Plan Administrator. Requests for reimbursement shall be made at such time or times as specified by the Plan Administrator; however, eligible expenses incurred during a Plan Year must be submitted for reimbursement not later than three months after the close of the Plan Year. Eligible expenses that are not submitted on a timely basis in accordance with this 5.2(a) shall not be reimbursed.

(b) **Documentation.** A Participant's written request for reimbursement shall establish that the expense was incurred during the applicable time period, and must state that the amount has not been reimbursed and is not reimbursable under any other health plan or dependent care plan, and that the amount will not be used in connection with a deduction or credit on the Participant's federal income tax return. No advance reimbursement may be made of future or projected expenses. The written request must be accompanied with a written statement from an independent third party stating that the expense has been incurred and the amount of such expense.

(c) **Payment.** A Participant's request for reimbursement, when approved by the Plan Administrator, shall be paid as soon as reasonably practicable following such approval. Payments shall only be made in reimbursement to a Participant and shall not be made directly to a service provider. Except as provided in 5.1(e), reimbursements to a Participant shall not exceed the amount available in the Participant's Account for the type of expense for which reimbursement is requested.

5.3 Amount of Elective and Nonelective Contributions. The maximum amount of nonelective contributions available to any Participant under this Plan for a Plan Year shall equal the District contributions under 5.1(c). The maximum amount of elective contributions available to any Participant under this Plan for a Plan Year shall equal the annual amount of the Participant's share of the cost of the District-provided group health plan premiums for the Premium Payment Benefit, plus \$20,000.

The minimum amount of elective contributions that may be elected by any Participant under the health care reimbursement account program, the dental and vision care reimbursement account program, and the dependent care reimbursement account program shall

be \$20 per month for each program. The maximum amount for credit to the Participant's HSA is as described in Article 12.

Notwithstanding the foregoing, the maximum amount of salary reduction contributions available to any Participant under this Plan for a Plan Year for the health care reimbursement account program or dental and vision care reimbursement account program shall equal \$2,500 (plus cost-of-living adjustments permitted under applicable law) (\$2,550 for Plan Years beginning on or after January 1, 2015), prorated for any short Plan Year.

5.4 Expense Reimbursement After Participation Terminates. If, during a Plan Year, a Participant terminates employment, transfers to an ineligible class of employees, or ceases to make required contributions, he or she may nevertheless submit eligible Dependent Care Expenses incurred during the remainder of that Plan Year to the Plan Administrator for reimbursement under the dependent care reimbursement account program.

If a Participant terminates employment with the District or transfers to an ineligible class of employees and revokes his or her existing benefit elections, the Plan Administrator shall reimburse the Participant for any amount previously paid for coverage or benefits under the health care reimbursement account program or dental and vision care reimbursement account program relating to the period after the termination or transfer.

5.5 Qualified Reservist Distributions. Notwithstanding any other Plan provision to the contrary, a Participant may request a qualified reservist distribution from the Participant's health care reimbursement Account or dental and vision care reimbursement Account. The term "Account" as used in this 5.5, refers only to the foregoing two Accounts.

(a) Definition of Qualified Reservist Distribution. A qualified reservist distribution is a distribution to a Participant of all or a portion of the balance in the Participant's Account if: (1) the Participant is a qualified reservist as defined in (b) below, and (2) the request for a distribution is made during the period specified in (e) below.

(b) Definition of Qualified Reservist. A qualified reservist is a Participant who is, by reason of being a member of a reserve component (as defined in 37 U.S.C. § 101), ordered or called to active duty for a period of 180 days or more or for an indefinite period. The Plan Administrator may rely on the order or call to determine the period of active duty. If the order or call specifies that the period is for 180 days or more or is indefinite, the Participant is a qualified reservist, even if the actual period of active duty is less than 180 days or is otherwise changed. If the period of active duty specified in the order or call is less than 180 days, the Participant is not a qualified reservist unless subsequent calls or orders increase the total period of active duty to 180 days or more.

(c) Amount Available. The amount available as a qualified reservist distribution is the amount contributed to the Participant's Account as of the date of the request for distribution minus reimbursements received from the Account as of the date of the request.

time after receipt of the request for review. The written decision shall include the reasons for such decision with reference to the provisions of the Plan upon which the decision is based. The decision shall be final and binding upon the Claimant, the District, and all other persons involved.

6.5 Further Review. The Claimant must follow and exhaust the claims procedure described in this article before he or she can file suit for benefits. In no event may the Claimant file suit for benefits more than one year from the date on which the decision on review under 6.4 is sent to the Claimant.

The scope of any subsequent review of the benefit claim, judicial or otherwise, shall be limited to a determination as to whether the Plan Administrator acted arbitrarily or capriciously in the exercise of its discretion. In no event shall any such further review be on a de novo basis as the Plan Administrator has discretionary authority to determine eligibility for benefits and to construe the terms of this Plan.

ARTICLE 9**HEALTH CARE REIMBURSEMENT ACCOUNT PROGRAM**

9.1 General. This article is intended to qualify as an accident and health plan within the meaning of Code Section 106. It is intended that reimbursements under this program be eligible for exclusion from the gross income of Participants under Code Section 105(b). Accordingly, this program shall be interpreted and construed in accordance with Code Sections 106 and 105(e) and any regulations or other interpretations thereunder. This program represents one benefit that may be elected by Participants under the Portland Public Schools Cafeteria Plan, and a Participant under that Plan who elects the Health Care Expense Reimbursement Benefit thereunder is deemed to be a Participant under this health care reimbursement account program.

9.2 Amount of Coverage. The maximum amount of coverage that may be elected as a salary reduction contribution under this health care reimbursement account program for a Plan Year is limited to \$2,500 (plus cost-of-living adjustments permitted under applicable law) (\$2,550 for Plan Years beginning on or after January 1, 2015), prorated for any short Plan Year.

9.3 Health Care Expenses. Each Participant under this health care reimbursement account program will be entitled to receive for each Plan Year reimbursements of Health Care Expenses that are incurred during the Plan Year and that are not paid or reimbursed by insurance or otherwise, up to the dollar amount of coverage elected by the Participant for that Plan Year.

There will be no reimbursement for premiums paid by a Participant for health insurance. For example, there will not be any reimbursement for premiums paid for other health plan coverage, including premiums paid for health coverage under a plan maintained by the employer of the Participant's spouse or Dependent.

Health Care Expenses incurred after December 31, 2010, for medicines or drugs may be reimbursed under this health care reimbursement account program only if the medicine or drug (a) requires a prescription, (b) is available without a prescription (i.e., an over-the-counter medicine or drug) and the individual obtains a prescription, or (c) is insulin.

The coverage elected for a Plan Year is available only to reimburse expenses that are incurred during the Plan Year. An expense shall be treated as having been incurred when the medical, dental, or vision care that gives rise to the expense is provided or at the time the equipment, supplies, or drugs that give rise to the expense are purchased, and not when the Participant is formally billed, charged for, or pays for the expense.

ARTICLE 10**DENTAL AND VISION CARE REIMBURSEMENT ACCOUNT PROGRAM**

10.1 General. This article is intended to qualify as an accident and health plan within the meaning of Code Section 106. It is intended that reimbursements under this program be eligible for exclusion from the gross income of Participants under Code Section 105(b). Reimbursements under this program are limited to expenses that qualify as dental or vision care under Code Section 223(c). Accordingly, this program shall be interpreted and construed in accordance with Code Sections 106, 105(e), and 223 and any regulations or other interpretations thereunder. This program represents one benefit that may be elected by Participants under the Portland Public Schools Cafeteria Plan, and a Participant under that Plan who elects the Dental and Vision Care Expense Reimbursement Benefit thereunder is deemed to be a Participant under this dental and vision care reimbursement account program.

10.2 Limitations. The maximum amount of coverage that may be elected as a salary reduction contribution under this dental and vision care reimbursement account program for a Plan Year shall equal \$2,500 (plus cost-of-living adjustments permitted under applicable law) (\$2,550 for Plan Years beginning on or after January 1, 2015), prorated for any short Plan Year.

10.3 Dental and Vision Care Expenses. Each Participant under this dental and vision care reimbursement account program will be entitled to receive for each Plan Year reimbursements of Dental and Vision Care Expenses that are incurred during the Plan Year and that are not paid or reimbursed by insurance or otherwise, up to the dollar amount of coverage elected by the Participant for that Plan Year.

There will be no reimbursement for premiums paid by a Participant for any kind of health insurance. For example, there will not be any reimbursement for premiums paid for other dental plan coverage, including premiums paid for dental coverage under a plan maintained by the employer of the employee's spouse or Dependent.

Dental and Vision Care Expenses incurred for medicines or drugs may be reimbursed under this dental and vision care reimbursement account program only if the medicine or drug (a) requires a prescription, (b) is available without a prescription (i.e., an over-the-counter medicine or drug) and the individual obtains a prescription, or (c) is insulin.

The coverage elected for a Plan Year is available only to reimburse expenses that are incurred during the Plan Year. An expense shall be treated as having been incurred when the dental or vision care that gives rise to the expense is provided or at the time the equipment, supplies, or drugs that give rise to the expense are purchased, and not when the Participant is formally billed, charged for, or pays for the expense.

ARTICLE 12**HEALTH SAVINGS ACCOUNT**

12.1 General. An Eligible Employee may elect to make pre-tax Compensation reduction contributions to an HSA under 4.1(e) subject to the terms of Article 3 and this article. To make such contributions, the Eligible Employee must (a) be an “eligible individual” within the meaning of Code Section 223(c), (b) be covered by an HDHP coverage option provided by the District, and (c) have established an HSA account with an HSA trustee/custodian satisfactory to the Plan Administrator. If an Eligible Employee elects the Health Savings Account Benefit, the District will contribute to the Eligible Employee’s HSA, subject to the Eligible Employee’s continuing eligibility to contribute to an HSA, an amount as determined by the District and listed on Exhibit C. In no event will an Eligible Employee be allowed to receive such District contribution as a Cash Benefit.

12.2 Maximum Amount of Contributions. In no event shall the annual amount of the Participant's pre-tax Compensation reduction contributions and the District Contributions to the Participant’s HSA exceed the annual limit described in Code Section 223(b). The limit is the annual statutory maximum under Code Section 223(b), as adjusted for cost-of-living increases (\$3,350 for single HDHP coverage and \$6,650 for family HDHP coverage in 2015), plus additional catch-up contribution amounts for Participants who are age 55 or older as described in Code Section 223(b)(3) (\$1,000 for 2015).

Subject to the following, if the Participant is not eligible to contribute to an HSA for the entire Plan Year under this Article 12, the maximum annual contribution will be prorated for the number of months in which the Participant is eligible to contribute to an HSA. If a Participant is eligible to make HSA contributions during the last month of a Plan Year, however, the Participant’s maximum annual HSA contribution for the Plan Year is the greater of the following:

- (a) The prorated amount described in the preceding sentence; or
- (b) The maximum annual HSA contribution under Code Section 223(b)(2)(A) or 223(b)(2)(B) based on the Participant’s HDHP coverage (self-only or family) December 1 of that Plan Year, plus catch-up contributions under Code Section 223(b)(3), if applicable.

12.3 Forwarding of Contributions. The District will forward contributions to the Participant’s HSA that the Participant has established with an HSA custodian or trustee. The Plan Administrator may limit the number of HSA providers to whom it will forward HSA contributions.

12.4 Status of HSA. The HSA Benefit under this Plan consists solely of the Participant’s ability to make pre-tax Compensation reduction contributions to the HSA and the District contributions that are made to the HSA. The terms and conditions of each Participant’s HSA are described in the HSA trust or custodial agreement provided by the applicable trustee or custodian and are not a part of this Plan.

**EXHIBIT B
PORTLAND PUBLIC SCHOOLS
CAFETERIA PLAN**

**Cash Out of District Contribution
(Referent Section 4.1(d))**

A Participant for whom the Plan Year under Exhibit A would be October 1 through September 30 shall be entitled to \$275 in taxable cash compensation in each month in which he or she elects not to receive (and does not receive) coverage under the District's medical, dental, and vision plans, provided the Participant demonstrates to the Plan Administrator's satisfaction that he or she has coverage under another group medical plan, including a government provided basic medical plan.

**EXHIBIT C
PORTLAND PUBLIC SCHOOLS
CAFETERIA PLAN**

**District Contribution
(Referent Section 5.1(c))**

The amount of the District monthly contribution for each Plan Year for each Participant shall be the District's share of the premium for coverage under the District-provided group health plans.

The District will contribute the following additional amount for each Eligible Employee who elects the Health Savings Account Benefit described in 4.1(e): (1) \$150 per month for an Eligible Employee enrolled in self-only coverage under a District-provided HDHP option, or (2) \$275 per month for an Eligible Employee enrolled in family coverage under a District-provided HDHP option.

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

INDEX TO THE AGENDA

January 6, 2015

Board Action Number	Page
---------------------------	------

Other Items Requiring Board Action

5007	Resolution to Adopt Revised Cash Management Policy 8.20.010-P	3
5008	Settlement Agreement.....	3

Other Items Requiring Board Action

The Superintendent RECOMMENDS adoption of the following items:

Numbers 5007 and 5008

RESOLUTION No. 5007

Resolution to Adopt Revised Cash Management Policy 8.20.010-P

RECITALS

- A. Annual approval of the Cash Management Policy is required by ORS Chapter 294.135(a).
- B. On December 2, 2014, staff presented the first reading to the Board of the revised Cash Management Policy. Per District Policy, the public comment period was open for 21 days.

RESOLUTION

The Board of Education hereby adopts the revised Cash Management Policy 8.20.010-P.

J. Patterson

RESOLUTION No. 5008

Settlement Agreement

RESOLUTION

- 1. The authority to pay \$34,900 in total is granted in a settlement agreement for employee T.M. to resolve claims brought under Workers' Compensation. \$34,900 will resolve the open workers' compensation claims including all medical and legal bills. An additional \$100 will be paid for a voluntary employment resignation. The employee has agreed to resign from PPS.
- 2. The total expenditure will be charged to the District's self-insurance fund 601.

J. Patterson / D.Buntin