

**BOARD OF EDUCATION**

Portland Public Schools  
**REGULAR MEETING**  
June 17, 2013

**Board Auditorium**

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

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**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.*

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**AGENDA**

1. **HONORING DIRECTORS SARGENT AND GONZALEZ** 6:00 pm
2. **SUPERINTENDENT'S REPORT** 6:15 pm
3. **STUDENT TESTIMONY** 6:35 pm
4. **PUBLIC COMMENT** 6:50 pm
5. **SECOND READING: AFFIRMATIVE ACTION POLICY** 7:10 pm  
(action item)
6. **PPS FOUNDATION AND EQUITY GRANT FUND** 7:30 pm
7. **LEGISLATIVE UPDATE** 7:40 pm
8. **AMENDMENT NO. 3 TO 2012-2013 BUDGET** (action item) 7:55 pm
9. **ADOPTION OF 2013-2014 BUDGET** (action item) 8:00 pm
10. **MONTHLY CAPITAL IMPROVEMENT BOND UPDATE** 8:20 pm
11. **BUSINESS AGENDA** 8:35 pm
12. **ADJOURN** 8:40 pm

The next meeting of the Board will be held on **Wednesday, July 17, 2013**, at **5:00 pm** in the Board Auditorium at the Blanchard Education Service Center.

**Portland Public Schools Nondiscrimination Statement**

Portland Public Schools recognizes the diversity and worth of all individuals and groups and their roles in society. All individuals and groups shall be treated with fairness in all activities, programs and operations, without regard to age, color, creed, disability, marital status, national origin, race, religion, sex, or sexual orientation.



# Board of Education

## Superintendent's Recommendation to the Board

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**Board Meeting Date:** June 17, 2013

**Executive Committee Lead:** Lorenzo Poe & Jollee Patterson

**Department(s):** Office of Equity & Partnerships and General Counsel's Office

**Presenter/Staff Lead:** Lorenzo Poe, Jollee Patterson & Sean Murray

**Agenda Action:** \_\_\_Resolution \_\_\_X\_\_\_Policy

**SUBJECT: Affirmative Action Policy & Updated Nondiscrimination Policy**

### BRIEF SUMMARY AND RECOMMENDATION

Staff recommends that the Superintendent present the attached Affirmative Action Policy & updated Nondiscrimination Policy for second reading and adoption on June 17, 2013.

### BACKGROUND

On June 13, 2011, Portland Public Schools Racial Educational Equity Policy (2.10.010-P) was adopted by Resolution No. 4459. This Policy directs the Superintendent to develop action plans with clear accountability and metrics, including prioritizing staffing and budget allocations, which will result in measurable results on a yearly basis towards achieving the policy's stated goals. The Policy identifies six key goals. "Goal C" states:

*The District shall recruit, employ, support and retain racially and linguistically diverse and culturally competent administrative, instructional and support personnel, and shall provide professional development to strengthen employees' knowledge and skills for eliminating racial and ethnic disparities in achievement. Additionally, in alignment with the Oregon Minority Teacher Act, the District shall actively strive to have our teacher and administrator workforces reflect the diversity of our student body."*

In 1991, the Oregon Legislature, recognizing the disparity between its diverse student population and predominantly European-American teacher workforce, drafted the Minority Teacher Act. It reads:

*The State of Oregon is committed to ethnic-racial equity and, therefore, it is the goal of the state that by the year 2001, the number of minority teachers, including administrators, employed by school districts and education service districts shall be approximately proportionate to the number of minority children enrolled in the public schools of this state.*

**Reviewed and Approved by Superintendent**

*Carole Smith*

In order to address Goal C of the Racial Educational Equity Policy, the Superintendent is presenting both (a) a revision to the District's Nondiscrimination Policy (1.80.020-P) and (b) a draft of an Affirmative Action Policy for adoption.

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#### **RELATED POLICIES / BOARD GOALS AND PRIORITIES**

- 1) Portland Public Schools Racial Educational Equity Policy (2.10.010-P)
  - 2) Nondiscrimination Policy (1.80.020-P)
  - 3) 2012-2013 Board Priority B: *"The Board has continued to adopt policies that further equity in the District, including the Equity in Public Contracting Policy (by July 2012) and the Affirmative Action/Diversity in Staffing Policy (by June 2013) to ensure that the District has an environment that allows for a diverse workforce and pool of contractors reflective of the community we serve."*
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#### **PROCESS / COMMUNITY ENGAGEMENT**

We engaged a variety of internal and external partners as well as content experts to solicit feedback and input.

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#### **ALIGNMENT WITH EQUITY POLICY IMPLEMENTATION PLAN**

The Affirmative Action Policy directly addresses Strategy C9 of the 2012-2017 Racial Equity Plan: "Facilitate development, adoption and implementation of an affirmative action policy."

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#### **BUDGET / RESOURCE IMPLICATIONS**

We are in the process of finalizing baseline data analyses. Funds have been requested for the 2013-2014 school year to develop the Affirmative Action Plan. Once the plan is finalized, we will be able to better understand and articulate the cost of implementation.

Policy implementation will incur costs including but not limited to: (1) staff time to implement the affirmative action plan—including staff training and monitoring processes (2) third-party annual reporting (3) staff time to handle investigations.

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

- 1) If the Board concurs with the Superintendent's recommendation and adopts the policies, work will begin on development of an Affirmative Action Plan.
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#### **ATTACHMENTS**

- 1) Affirmative Action Policy (5.10.025-P)
- 2) Nondiscrimination Policy (1.80.020-P)—Updated

<p><b>Reviewed and Approved by Superintendent</b></p>
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# Board of Education

## Superintendent's Recommendation to the Board

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**Board Meeting Date:** June 17, 2013

**Executive Committee Lead:** Neil Sullivan  
Chief Financial Officer

**Department:** Finance/Budget

**Presenters/Staff Leads:**  
David Wynde, Deputy CFO & Budget Director  
Sara Bottomley, Assistant Budget Director

**Agenda Action:**   X Resolution    \_\_\_\_\_Policy

**SUBJECT: Amendment #3 to PPS 2012/13 Budget**

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### BRIEF SUMMARY AND RECOMMENDATION

The Board is asked to amend the fiscal year 2012/13 budget.

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### BACKGROUND

School districts are allowed, and sometimes required by law (ORS 294.480), to amend the budget during the fiscal year. The District has experienced changes in its financial position that require updating the budget to better reflect the current status.

- On June 25, 2012 the Board, by way of Resolution No. 4619, voted to adopt an annual budget for the Fiscal Year 2012/13 as required under Local Budget Law.
- On January 28, 2013 the Board, by way of Resolution No. 4708, amended the Fiscal Year 2012/13 budget.
- On April 1, 2013 the Board, by way of Resolution No. 4746, amended the Fiscal Year 2012/13 budget for a second time.

Each spring, the Finance Department conducts a review process whereby the current budget is reviewed and compared to the actual activities the district has engaged in and prepares an amended budget accordingly. This budget amendment is the result of that process.

Increases in expenditures for Fund 438 are greater than 10% above those in Amendment #2, and as such require inclusion in a public hearing to be held by the Board prior to amending the budget, as covered by ORS 294.480 (4).

### **General Fund (Fund 101):**

**Reviewed and Approved by Superintendent**

Handwritten signature of Carrie Smith in cursive script.

Instruction is modestly higher (\$120,003) primarily to provide for funding for summer school. The approved budget for 2013/14 includes \$300,000 for summer school. This current funding covers expenditures during the current fiscal year.

Support Services is reduced (\$453,515) because of expenditures related to activity in Facilities and IT, originally planned and budgeted to take place before June 30, 2013, that have been delayed until after July 1. This budget action represents the carry-over of this activity and budget into next fiscal year. The 2012/13 budget is reduced and the 2013/14 budget increased. The 2013/14 budget action is included in the budget adoption that will also be considered by the board on June 17, 2013.

Debt Service & Transfers Out is increased slightly (\$27,662) because of funds from the Great Fields contingency to be transferred to the Facilities Capital Fund (Fund 438) to finance the beginning of work at Jefferson High School (\$18,000), and additional funds required to finance the debt service on the Recovery Zone bonds because of lower interest subsidy due to federal sequestration (\$9,662).

Contingency is increased (\$305,850) as a consequence of all these changes.

**Grants Fund (Fund 205):**

The appropriations for Instruction (reduced by \$600,000) and Enterprise & Community Services (increased by \$500,000) and Facilities Acquisition & Construction (increased by \$100,000) are changes to true up these amounts in light of actual expenditures under a number of grants (including several school improvement grants, the federal farm-to-school grant, Clean Air Works, and grants for health clinics). The original budget was based upon estimates of the allocation among appropriation categories, which are now revised as the plans have evolved over the course of the year.

**Dedicated Resource Fund (Fund 299):**

The beginning fund balance is reduced (\$366,815) to reflect the actual number from the annual audited financial statements. Requirements are changed to reflect this lower fund balance and a minor technical adjustment to true up appropriations among categories.

**Full Faith and Credit Debt Service Fund (Fund 320):**

Resources are adjusted to reflect the lower federal interest subsidy, which is covered by an increase in the transfer from the general fund.

**Facilities Capital Fund (Fund 438):**

The recently issued capital bonds were used, in part, to repay the interim debt incurred by PPS which was a \$45 million line of credit. The line of credit was fully advanced immediately before the repayment and the changes to Fund 438 reflect the final proceeds under the line.

The increase in Other Sources (\$2,063,350) is the additional amount advanced and this same amount is appropriated under Facilities Acquisition & Construction. These funds are being used to complete the boiler burner conversion project during summer of 2013 and for other eligible capital projects.

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**RELATED POLICIES / BOARD GOALS AND PRIORITIES**

<p><b>Reviewed and Approved by Superintendent</b></p>
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This amendment is necessary to ensure effective financial management of the District's programs and priorities and to remain in compliance with State statute. Specifically, the District is required to ensure legal appropriation of expenditures by program area as defined in the State Chart of Accounts.

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#### **PROCESS / COMMUNITY ENGAGEMENT**

These changes represent relatively minor amendments to the current fiscal year budget. They are all in alignment with the overall direction set for 2012/13. Given that one of the changes, for Fund 438 represents a change of more than 10% in the total for that fund, a public hearing is required and the appropriate notice was published. No additional public process or community engagement was undertaken.

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#### **ALIGNMENT WITH EQUITY POLICY IMPLEMENTATION PLAN**

This amendment makes no change to the alignment of the 2012/13 budget with the PPS equity policy implementation plan.

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

Staff will process the amendment before June 30 to ensure compliance for the fiscal year end.

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#### **ATTACHMENTS**

- A. Resolution – Amendment No. 3 to the 2012/13 Budget for School District No. 1J, Multnomah County, Oregon

<b>Reviewed and Approved by Superintendent</b>
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# Board of Education

## Superintendent's Recommendation to the Board

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**Board Meeting Date:** June 17, 2013

**Executive Committee Lead:** Neil Sullivan,  
Chief Financial Officer

**Department:** Finance / Budget

**Presenter/Staff Lead:**  
David Wynde, Deputy CFO & Budget Director  
Sara Bottomley, Assistant Budget Director

**Agenda Action:**   X Resolution   \_\_\_\_\_ Policy

**SUBJECT: Adoption of 2013/14 Budget & Imposition of Taxes**

### BRIEF SUMMARY AND RECOMMENDATION

The Board is asked to complete the actions necessary to legally impose property taxes for fiscal year 2013/14 and adopt the fiscal year 2013/14 budget.

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### BACKGROUND

Under ORS 294, Local Budget law, jurisdictions are required to adopt the future fiscal year budget by June 30 of the current fiscal year. These actions will also impose the appropriate property taxes.

- On April 15, 2013 the superintendent proposed a budget for PPS for the 2013/14 year and delivered her budget message to the board and the community.
- On May 20, 2013, the board acting as the Budget Committee, by way of resolution No. 4759 approved the 2013/14 budget and imposed taxes.
- Upon approval the budget is then submitted to the Tax Supervising Conservation Commission (TSCC) for review and approval. The TSCC is required to hold a public hearing on the Approved Budget. This hearing is scheduled for June 17, 2013, immediately preceding the board meeting.

The changes from the Approved Budget as voted on by the budget committee are summarized in Attachment A to this report and outlined below. These changes are relatively few in number and do not represent any major differences from the approved budget.

### **General Fund (Fund 101):**

#### Resources:

Beginning Fund Balance is higher (\$305,850) reflecting changes made to 2012/13 budget in amendment #3, which are primarily some Facilities and IT expenditures carried forward to 2013/14 partially offset by higher expenditures for summer school.

**Reviewed and Approved by Superintendent**

Handwritten signature of Carrie Smith in cursive script.



Intermediate Sources is higher (\$167,017) because we have revised our estimate for MESD transit dollars as MESD updated its budget to reflect the legislature's budget actions.

**Requirements:**

Instruction is modestly higher (\$138,226) because of technical corrections as staffing calculations were completed.

Support Services is higher (\$416,131) because of expenditures related to the carry-over activity in Facilities and IT, partially offset by technical corrections.

Debt Service & Transfers Out is increased (\$292,921) because the remaining Great Fields contingency is transferred to the Facilities Capital Fund (Fund 438).

Contingency is reduced (\$374,411) because of the Great Fields transfer and the cumulative impact of the technical adjustments. After these changes the uncommitted contingency (i.e. excluding the self-insurance reserve of \$1.5 million) is \$18.6 million or 4.04% of total expenditures.

**Grants Fund (Fund 205):**

This is revised with offsetting reductions (\$14 million) to both resources and expenditures. PPS had applied to be the provider of some regional early intervention services currently provided by MESD, and was not awarded the contract.

**Facilities Capital Fund (Fund 438):**

Resources and Requirements were changed to include the transfer in and appropriation of the remaining Great Fields funds (\$292,921).

**GO Bonds Fund (Fund 450):**

Beginning Fund Balance was reduced (\$6,407,938) to reflect the actual amount of capital bonds issued earlier this year. The 2012/13 budget included an amount of bond proceeds at the upper limit of what might have been possible. This change trues up the amount expected to be carried over into 2013/14 to reflect the actual amount of bond proceeds.

On the requirements side of the ledger, Facilities Acquisition & Construction expenditures is increased (\$934,899) to reflect current plans for 2013/14 activity. Contingency is reduced (\$7,342,837) as a consequence of these two changes to beginning fund balance and budgeted expenditures.

**Self-Insurance Fund (Fund 601):**

The budget for this fund is increased (\$2,589) as a technical adjustment as forecast staffing expenditures are trued up.

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**RELATED POLICIES / BOARD GOALS AND PRIORITIES**

An adopted budget is necessary to ensure effective financial management of the District's programs and priorities and to remain in compliance with State statute. Specifically, the District

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is required to ensure legal appropriation of expenditures by program area as defined in the State Chart of Accounts.

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## **PROCESS / COMMUNITY ENGAGEMENT**

There has been substantial public and community engagement in the budget process this year.

The superintendent and her staff have been meeting with community partners, including the Coalition of Communities of Color, for three years to discuss the PPS Racial Educational Equity Policy and its implementation. This implementation is manifest in this budget in several ways, not least of which is the change in the equity allocation in school staffing. The superintendent held six budget listening sessions to inform the preparation of her proposed budget on April 15: one public meeting for PPS staff, one for representatives of our employees, one at the teachers' association representative assembly, two public meetings open to the community, and one with PPS students.

The board discussed the proposed budget and heard public testimony at four board meetings and, acting as the budget committee, held two public hearings. In addition to concerns regarding some individual schools, the majority of the public testimony was on two subjects: a number of individuals and representatives of community partners spoke in support of the budget and its actualization of the Racial Educational Equity Policy; and a number of parents and representatives of parent coalitions spoke out on concerns about high school staffing and the inability of students to have a full school day.

The superintendent and staff met with representatives of these parent coalitions in response to their concerns about high school staffing and, as directed by the board, developed a budget option for increased staffing in high schools that the board, acting as the budget committee, included in the approved budget.

The Citizens Budget Review Committee, composed of community representatives, met beginning in September 2012, and reviewed the proposed budget and reported to the board on its findings.

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## **ALIGNMENT WITH EQUITY POLICY IMPLEMENTATION PLAN**

The Racial Educational Equity Policy states that "To achieve educational equity, PPS will provide additional and differentiated resources to support the success of all students, including students of color."

This budget does that in several important ways:

This budget changes the equity allocation component of school staffing in a critically important way. In keeping with previous years' socio-economic status (SES) allocation, we are providing a portion (4 percent) of the staffing ratio to schools with high percentages of students on free-or-reduced priced meals. However, it is also clear from our data; students in poverty are not the only students we need to target for resources and services.

In alignment with our Racial Educational Equity Policy and our Milestone and achievement compact targets, this budget allocates another 4% of the staffing ratio to schools with a high percentage of historically underserved students. The combined historically underserved measure is defined by the state of Oregon in the achievement compact as:

<b>Reviewed and Approved by Superintendent</b>
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- Students from one of the four historically underserved racial groups (Black, Latino, Native American, and Pacific Islander)
- Students who qualify for Special Education services
- Students who are eligible for free-or-reduced priced meals
- Students who qualify for English as a Second Language services

This new allocation differentiates resources to schools to address closing the achievement / opportunity gap for our historically underserved students. We have set ambitious targets for all of our students and we must resource schools to fund the strategies and the supports needed to ensure that all students succeed. These equity allocations are an important investment toward those goals.

PPS has seen exciting gains in student achievement over the last few years. It is imperative that we continue to focus on raising achievement for all students because we are not yet where we need to be. This means that we will continue to have equity at the center of all that we do.

In alignment with the PPS equity plan, this budget will provide resources to:

- Continue to support the professional development of our Board, staff across all schools, and the central office to enhance our culturally responsive practice and decision-making at all levels of the organization.
- Develop an Affirmative Action policy and implementation plan.
- Provide resources to support the implementation of the Jefferson Enrollment Balancing process.
- Revise the Enrollment and Transfer Policy to align with the Racial Educational Equity Policy.
- Maintain investment in our family engagement staff and continue to contract with culturally-specific community-based organizations.

PPS has a persistent challenge of over-representation and exclusion of students of color in student discipline. This budget includes funding for a third-party hearings officer to improve disciplinary consistency across the district and allow our principals to serve as advocates for their students in the discipline process, and to expand effective prevention strategies such as Restorative Justice to continue to eliminate disparities in discipline outcomes.

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

Upon the vote by the board, staff will complete and publish the budget document, will file with all necessary authorities and will communicate with county tax assessors to ensure that they have the information necessary to levy taxes.

## **ATTACHMENTS**

- A. Summary of Changes between 2013/14 Approved and Adopted – by Fund
- B. Resolution – Impose Taxes and Adoption of 2013/14 Budget for School District No. 1J, Multnomah County, Oregon

<p><b>Reviewed and Approved by Superintendent</b></p>
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**Attachment "A"**  
**Summary of Changes between 2013/14 Approved and Adopted**

101 - General Fund	Proposed Budget	Approved Budget	Change	Adopted Budget
Resources				
Beginning Fund Balance	20,856,290	20,856,290	305,850	21,162,140
Local Sources	263,159,300	263,159,300	-	263,159,300
Intermediate Sources	12,290,000	12,290,000	167,017	12,457,017
State Sources	188,782,292	188,782,292	-	188,782,292
Federal Sources	-	-	-	-
Other Sources	2,000,000	2,000,000	-	2,000,000
<b>Total</b>	<b>487,087,882</b>	<b>487,087,882</b>	<b>472,867</b>	<b>487,560,749</b>

Requirements				
Instruction	276,921,264	278,824,513	138,226	278,962,739
Support Services	183,181,248	181,450,785	416,131	181,866,916
Enterprise and Community Services	1,640,220	1,640,220	-	1,640,220
Facilities Acquisition & Construction	-	-	-	-
Debt Service & Transfers Out	4,613,864	4,613,864	292,921	4,906,785
Contingency	20,731,286	20,558,500	(374,411)	20,184,089
Ending Fund Balance	-	-	-	-
<b>Total</b>	<b>487,087,882</b>	<b>487,087,882</b>	<b>472,867</b>	<b>487,560,749</b>

201 - Student Body Activity Fund	Proposed Budget	Approved Budget	Change	Adopted Budget
Resources				
Beginning Fund Balance	3,396,380	3,396,380	-	3,396,380
Local Sources	8,818,532	8,818,532	-	8,818,532
Intermediate Sources	-	-	-	-
State Sources	-	-	-	-
Federal Sources	-	-	-	-
Other Sources	-	-	-	-
<b>Total</b>	<b>12,214,912</b>	<b>12,214,912</b>	<b>-</b>	<b>12,214,912</b>

Requirements				
Instruction	8,954,082	8,954,082	-	8,954,082
Support Services	-	-	-	-
Enterprise and Community Services	-	-	-	-
Facilities Acquisition & Construction	-	-	-	-
Debt Service & Transfers Out	-	-	-	-
Contingency	-	-	-	-
Ending Fund Balance	3,260,830	3,260,830	-	3,260,830
<b>Total</b>	<b>12,214,912</b>	<b>12,214,912</b>	<b>-</b>	<b>12,214,912</b>

**Attachment "A"**  
**Summary of Changes between 2013/14 Approved and Adopted**

202 - Cafeteria Fund	Proposed Budget	Approved Budget	Change	Adopted Budget
Resources				
Beginning Fund Balance	3,541,721	3,541,721	-	3,541,721
Local Sources	3,663,211	3,663,211	-	3,663,211
Intermediate Sources	-	-	-	-
State Sources	216,543	216,543	-	216,543
Federal Sources	13,261,905	13,261,905	-	13,261,905
Other Sources	-	-	-	-
<b>Total</b>	<b>20,683,380</b>	<b>20,683,380</b>	<b>-</b>	<b>20,683,380</b>

Requirements				
Instruction	-	-	-	-
Support Services	-	-	-	-
Enterprise and Community Services	18,685,858	18,685,858	-	18,685,858
Facilities Acquisition & Construction	-	-	-	-
Debt Service & Transfers Out	-	-	-	-
Contingency	-	-	-	-
Ending Fund Balance	1,997,522	1,997,522	-	1,997,522
<b>Total</b>	<b>20,683,380</b>	<b>20,683,380</b>	<b>-</b>	<b>20,683,380</b>

205 - Grants Fund	Proposed Budget	Approved Budget	Change	Adopted Budget
Resources				
Beginning Fund Balance	-	-	-	-
Local Sources	1,884,377	1,884,377	-	1,884,377
Intermediate Sources	-	-	-	-
State Sources	16,536,346	16,536,346	-	16,536,346
Federal Sources	46,675,731	60,675,731	(14,000,000)	46,675,731
Other Sources	-	-	-	-
<b>Total</b>	<b>65,096,454</b>	<b>79,096,454</b>	<b>(14,000,000)</b>	<b>65,096,454</b>

Requirements				
Instruction	37,107,825	51,105,815	(14,000,000)	37,105,815
Support Services	26,005,070	26,007,073	-	26,007,073
Enterprise and Community Services	1,983,559	1,983,566	-	1,983,566
Facilities Acquisition & Construction	-	-	-	-
Debt Service & Transfers Out	-	-	-	-
Contingency	-	-	-	-
Ending Fund Balance	-	-	-	-
<b>Total</b>	<b>65,096,454</b>	<b>79,096,454</b>	<b>(14,000,000)</b>	<b>65,096,454</b>

**Attachment "A"**  
**Summary of Changes between 2013/14 Approved and Adopted**

225 - PERS Rate Stabilization Reserve Fund	Proposed Budget	Approved Budget	Change	Adopted Budget
Resources				
Beginning Fund Balance	13,574,383	13,574,383	-	13,574,383
Local Sources	195,200	195,200	-	195,200
Intermediate Sources	-	-	-	-
State Sources	-	-	-	-
Federal Sources	-	-	-	-
Other Sources	-	-	-	-
<b>Total</b>	<b>13,769,583</b>	<b>13,769,583</b>	<b>-</b>	<b>13,769,583</b>

Requirements				
Instruction	-	-	-	-
Support Services	-	-	-	-
Enterprise and Community Services	-	-	-	-
Facilities Acquisition & Construction	-	-	-	-
Debt Service & Transfers Out	1,900,000	1,900,000	-	1,900,000
Contingency	-	-	-	-
Ending Fund Balance	11,869,583	11,869,583	-	11,869,583
<b>Total</b>	<b>13,769,583</b>	<b>13,769,583</b>	<b>-</b>	<b>13,769,583</b>

299 - Dedicated Resource Fund	Proposed Budget	Approved Budget	Change	Adopted Budget
Resources				
Beginning Fund Balance	4,511,662	4,511,662	-	4,511,662
Local Sources	13,383,300	13,383,300	-	13,383,300
Intermediate Sources	-	-	-	-
State Sources	-	-	-	-
Federal Sources	95,000	95,000	-	95,000
Other Sources	-	-	-	-
<b>Total</b>	<b>17,989,962</b>	<b>17,989,962</b>	<b>-</b>	<b>17,989,962</b>

Requirements				
Instruction	14,029,587	14,029,587	-	14,029,587
Support Services	1,920,240	1,920,240	-	1,920,240
Enterprise and Community Services	65,906	65,906	-	65,906
Facilities Acquisition & Construction	1,974,229	1,974,229	-	1,974,229
Debt Service & Transfers Out	-	-	-	-
Contingency	-	-	-	-
Ending Fund Balance	-	-	-	-
<b>Total</b>	<b>17,989,962</b>	<b>17,989,962</b>	<b>-</b>	<b>17,989,962</b>

**Attachment "A"**  
**Summary of Changes between 2013/14 Approved and Adopted**

<b>306 - Settlement Debt Service Fund</b>	<b>Proposed Budget</b>	<b>Approved Budget</b>	<b>Change</b>	<b>Adopted Budget</b>
Resources				
Beginning Fund Balance	-	-	-	-
Local Sources	-	-	-	-
Intermediate Sources	-	-	-	-
State Sources	-	-	-	-
Federal Sources	-	-	-	-
Other Sources	1,448,700	1,448,700	-	1,448,700
<b>Total</b>	<b>1,448,700</b>	<b>1,448,700</b>	<b>-</b>	<b>1,448,700</b>

Requirements				
Instruction	-	-	-	-
Support Services	-	-	-	-
Enterprise and Community Services	-	-	-	-
Facilities Acquisition & Construction	-	-	-	-
Debt Service & Transfers Out	1,448,700	1,448,700	-	1,448,700
Contingency	-	-	-	-
Ending Fund Balance	-	-	-	-
<b>Total</b>	<b>1,448,700</b>	<b>1,448,700</b>	<b>-</b>	<b>1,448,700</b>

<b>307 - IT Projects Debt Service Fund</b>	<b>Proposed Budget</b>	<b>Approved Budget</b>	<b>Change</b>	<b>Adopted Budget</b>
Resources				
Beginning Fund Balance	-	-	-	-
Local Sources	-	-	-	-
Intermediate Sources	-	-	-	-
State Sources	-	-	-	-
Federal Sources	-	-	-	-
Other Sources	1,587,362	1,587,362	-	1,587,362
<b>Total</b>	<b>1,587,362</b>	<b>1,587,362</b>	<b>-</b>	<b>1,587,362</b>

Requirements				
Instruction	-	-	-	-
Support Services	-	-	-	-
Enterprise and Community Services	-	-	-	-
Facilities Acquisition & Construction	-	-	-	-
Debt Service & Transfers Out	1,587,362	1,587,362	-	1,587,362
Contingency	-	-	-	-
Ending Fund Balance	-	-	-	-
<b>Total</b>	<b>1,587,362</b>	<b>1,587,362</b>	<b>-</b>	<b>1,587,362</b>

**Attachment "A"**  
**Summary of Changes between 2013/14 Approved and Adopted**

<b>308 - PERS UAL Debt Service Fund</b>	<b>Proposed Budget</b>	<b>Approved Budget</b>	<b>Change</b>	<b>Adopted Budget</b>
Resources				
Beginning Fund Balance	-	-	-	-
Local Sources	38,134,327	38,134,327	-	38,134,327
Intermediate Sources	-	-	-	-
State Sources	-	-	-	-
Federal Sources	-	-	-	-
Other Sources	-	-	-	-
<b>Total</b>	<b>38,134,327</b>	<b>38,134,327</b>	<b>-</b>	<b>38,134,327</b>

Requirements				
Instruction	-	-	-	-
Support Services	-	-	-	-
Enterprise and Community Services	-	-	-	-
Facilities Acquisition & Construction	-	-	-	-
Debt Service & Transfers Out	38,134,327	38,134,327	-	38,134,327
Contingency	-	-	-	-
Ending Fund Balance	-	-	-	-
<b>Total</b>	<b>38,134,327</b>	<b>38,134,327</b>	<b>-</b>	<b>38,134,327</b>

<b>309 - SELP Debt Service Fund</b>	<b>Proposed Budget</b>	<b>Approved Budget</b>	<b>Change</b>	<b>Adopted Budget</b>
Resources				
Beginning Fund Balance	-	-	-	-
Local Sources	-	-	-	-
Intermediate Sources	-	-	-	-
State Sources	-	-	-	-
Federal Sources	-	-	-	-
Other Sources	76,284	76,284	-	76,284
<b>Total</b>	<b>76,284</b>	<b>76,284</b>	<b>-</b>	<b>76,284</b>

Requirements				
Instruction	-	-	-	-
Support Services	-	-	-	-
Enterprise and Community Services	-	-	-	-
Facilities Acquisition & Construction	-	-	-	-
Debt Service & Transfers Out	76,284	76,284	-	76,284
Contingency	-	-	-	-
Ending Fund Balance	-	-	-	-
<b>Total</b>	<b>76,284</b>	<b>76,284</b>	<b>-</b>	<b>76,284</b>



**Attachment "A"**  
**Summary of Changes between 2013/14 Approved and Adopted**

<b>320 - Full Faith and Credit Debt Service Fund</b>	<b>Proposed Budget</b>	<b>Approved Budget</b>	<b>Change</b>	<b>Adopted Budget</b>
Resources				
Beginning Fund Balance	-	-	-	-
Local Sources	-	-	-	-
Intermediate Sources	-	-	-	-
State Sources	-	-	-	-
Federal Sources	207,744	207,744	-	207,744
Other Sources	1,113,415	1,113,415	-	1,113,415
<b>Total</b>	<b>1,321,159</b>	<b>1,321,159</b>	<b>-</b>	<b>1,321,159</b>

Requirements				
Instruction	-	-	-	-
Support Services	-	-	-	-
Enterprise and Community Services	-	-	-	-
Facilities Acquisition & Construction	-	-	-	-
Debt Service & Transfers Out	1,321,159	1,321,159	-	1,321,159
Contingency	-	-	-	-
Ending Fund Balance	-	-	-	-
<b>Total</b>	<b>1,321,159</b>	<b>1,321,159</b>	<b>-</b>	<b>1,321,159</b>

<b>350 - GO Bond Debt Service Fund</b>	<b>Proposed Budget</b>	<b>Approved Budget</b>	<b>Change</b>	<b>Adopted Budget</b>
Resources				
Beginning Fund Balance	-	-	-	-
Local Sources	45,423,000	43,262,232	-	43,262,232
Intermediate Sources	-	-	-	-
State Sources	-	-	-	-
Federal Sources	-	-	-	-
Other Sources	-	-	-	-
<b>Total</b>	<b>45,423,000</b>	<b>43,262,232</b>	<b>-</b>	<b>43,262,232</b>

Requirements				
Instruction	-	-	-	-
Support Services	-	-	-	-
Enterprise and Community Services	-	-	-	-
Facilities Acquisition & Construction	-	-	-	-
Debt Service & Transfers Out	43,260,000	43,262,232	-	43,262,232
Contingency	-	-	-	-
Ending Fund Balance	2,163,000	-	-	-
<b>Total</b>	<b>45,423,000</b>	<b>43,262,232</b>	<b>-</b>	<b>43,262,232</b>

**Attachment "A"**  
**Summary of Changes between 2013/14 Approved and Adopted**

404 - Construction Excise Fund	Proposed Budget	Approved Budget	Change	Adopted Budget
Resources				
Beginning Fund Balance	7,472,033	7,472,033	-	7,472,033
Local Sources	1,611,000	1,611,000	-	1,611,000
Intermediate Sources	-	-	-	-
State Sources	-	-	-	-
Federal Sources	-	-	-	-
Other Sources	-	-	-	-
<b>Total</b>	<b>9,083,033</b>	<b>9,083,033</b>	<b>-</b>	<b>9,083,033</b>

Requirements				
Instruction	-	-	-	-
Support Services	-	-	-	-
Enterprise and Community Services	-	-	-	-
Facilities Acquisition & Construction	9,083,033	9,083,033	-	9,083,033
Debt Service & Transfers Out	-	-	-	-
Contingency	-	-	-	-
Ending Fund Balance	-	-	-	-
<b>Total</b>	<b>9,083,033</b>	<b>9,083,033</b>	<b>-</b>	<b>9,083,033</b>

405 - School Modernization Fund	Proposed Budget	Approved Budget	Change	Adopted Budget
Resources				
Beginning Fund Balance	2,421,901	2,421,901	-	2,421,901
Local Sources	12,000	12,000	-	12,000
Intermediate Sources	-	-	-	-
State Sources	-	-	-	-
Federal Sources	-	-	-	-
Other Sources	-	-	-	-
<b>Total</b>	<b>2,433,901</b>	<b>2,433,901</b>	<b>-</b>	<b>2,433,901</b>

Requirements				
Instruction	-	-	-	-
Support Services	-	-	-	-
Enterprise and Community Services	-	-	-	-
Facilities Acquisition & Construction	2,433,901	2,433,901	-	2,433,901
Debt Service & Transfers Out	-	-	-	-
Contingency	-	-	-	-
Ending Fund Balance	-	-	-	-
<b>Total</b>	<b>2,433,901</b>	<b>2,433,901</b>	<b>-</b>	<b>2,433,901</b>

**Attachment "A"**  
**Summary of Changes between 2013/14 Approved and Adopted**

407 - IT System Project Fund	Proposed Budget	Approved Budget	Change	Adopted Budget
Resources				
Beginning Fund Balance	759,805	759,805	-	759,805
Local Sources	500	500	-	500
Intermediate Sources	-	-	-	-
State Sources	-	-	-	-
Federal Sources	-	-	-	-
Other Sources	-	-	-	-
<b>Total</b>	<b>760,305</b>	<b>760,305</b>	<b>-</b>	<b>760,305</b>

Requirements				
Instruction	-	-	-	-
Support Services	660,351	660,351	-	660,351
Enterprise and Community Services	-	-	-	-
Facilities Acquisition & Construction	-	-	-	-
Debt Service & Transfers Out	-	-	-	-
Contingency	99,954	99,954	-	99,954
Ending Fund Balance	-	-	-	-
<b>Total</b>	<b>760,305</b>	<b>760,305</b>	<b>-</b>	<b>760,305</b>

420 - Full Faith and Credit Fund	Proposed Budget	Approved Budget	Change	Adopted Budget
Resources				
Beginning Fund Balance	600,000	600,000	-	600,000
Local Sources	7,000	7,000	-	7,000
Intermediate Sources	-	-	-	-
State Sources	-	-	-	-
Federal Sources	-	-	-	-
Other Sources	-	-	-	-
<b>Total</b>	<b>607,000</b>	<b>607,000</b>	<b>-</b>	<b>607,000</b>

Requirements				
Instruction	-	-	-	-
Support Services	-	-	-	-
Enterprise and Community Services	-	-	-	-
Facilities Acquisition & Construction	607,000	607,000	-	607,000
Debt Service & Transfers Out	-	-	-	-
Contingency	-	-	-	-
Ending Fund Balance	-	-	-	-
<b>Total</b>	<b>607,000</b>	<b>607,000</b>	<b>-</b>	<b>607,000</b>

**Attachment "A"**  
**Summary of Changes between 2013/14 Approved and Adopted**

435 - Energy Efficient Schools Fund	Proposed Budget	Approved Budget	Change	Adopted Budget
Resources				
Beginning Fund Balance	577,791	577,791	-	577,791
Local Sources	856,336	856,336	-	856,336
Intermediate Sources	-	-	-	-
State Sources	-	-	-	-
Federal Sources	-	-	-	-
Other Sources	-	-	-	-
<b>Total</b>	<b>1,434,127</b>	<b>1,434,127</b>	<b>-</b>	<b>1,434,127</b>

Requirements				
Instruction	-	-	-	-
Support Services	-	-	-	-
Enterprise and Community Services	-	-	-	-
Facilities Acquisition & Construction	1,434,127	1,434,127	-	1,434,127
Debt Service & Transfers Out	-	-	-	-
Contingency	-	-	-	-
Ending Fund Balance	-	-	-	-
<b>Total</b>	<b>1,434,127</b>	<b>1,434,127</b>	<b>-</b>	<b>1,434,127</b>

438 - Facilities Capital Fund	Proposed Budget	Approved Budget	Change	Adopted Budget
Resources				
Beginning Fund Balance	3,898,931	3,898,931	-	3,898,931
Local Sources	3,000	3,000	-	3,000
Intermediate Sources	-	-	-	-
State Sources	1,300,000	1,300,000	-	1,300,000
Federal Sources	-	-	-	-
Other Sources	388,103	388,103	292,921	681,024
<b>Total</b>	<b>5,590,034</b>	<b>5,590,034</b>	<b>292,921</b>	<b>5,882,955</b>

Requirements				
Instruction	-	-	-	-
Support Services	-	-	-	-
Enterprise and Community Services	-	-	-	-
Facilities Acquisition & Construction	5,590,034	5,590,034	292,921	5,882,955
Debt Service & Transfers Out	-	-	-	-
Contingency	-	-	-	-
Ending Fund Balance	-	-	-	-
<b>Total</b>	<b>5,590,034</b>	<b>5,590,034</b>	<b>292,921</b>	<b>5,882,955</b>

**Attachment "A"**  
**Summary of Changes between 2013/14 Approved and Adopted**

<b>445 - Capital Asset Renewal Fund</b>	<b>Proposed Budget</b>	<b>Approved Budget</b>	<b>Change</b>	<b>Adopted Budget</b>
Resources				
Beginning Fund Balance	116,831	116,831	-	116,831
Local Sources	52,200	52,200	-	52,200
Intermediate Sources	-	-	-	-
State Sources	-	-	-	-
Federal Sources	-	-	-	-
Other Sources	-	-	-	-
<b>Total</b>	<b>169,031</b>	<b>169,031</b>	<b>-</b>	<b>169,031</b>

Requirements				
Instruction	-	-	-	-
Support Services	-	-	-	-
Enterprise and Community Services	-	-	-	-
Facilities Acquisition & Construction	169,031	169,031	-	169,031
Debt Service & Transfers Out	-	-	-	-
Contingency	-	-	-	-
Ending Fund Balance	-	-	-	-
<b>Total</b>	<b>169,031</b>	<b>169,031</b>	<b>-</b>	<b>169,031</b>

<b>450 - GO Bonds Fund</b>	<b>Proposed Budget</b>	<b>Approved Budget</b>	<b>Change</b>	<b>Adopted Budget</b>
Resources				
Beginning Fund Balance	110,000,000	110,000,000	(6,407,938)	103,592,062
Local Sources	28,000	28,000	-	28,000
Intermediate Sources	-	-	-	-
State Sources	-	-	-	-
Federal Sources	-	-	-	-
Other Sources	-	-	-	-
<b>Total</b>	<b>110,028,000</b>	<b>110,028,000</b>	<b>(6,407,938)</b>	<b>103,620,062</b>

Requirements				
Instruction	-	-	-	-
Support Services	-	-	-	-
Enterprise and Community Services	-	-	-	-
Facilities Acquisition & Construction	35,370,000	35,370,000	934,899	36,304,899
Debt Service & Transfers Out	-	-	-	-
Contingency	74,658,000	74,658,000	(7,342,837)	67,315,163
Ending Fund Balance	-	-	-	-
<b>Total</b>	<b>110,028,000</b>	<b>110,028,000</b>	<b>(6,407,938)</b>	<b>103,620,062</b>

**Attachment "A"**  
**Summary of Changes between 2013/14 Approved and Adopted**

480 - Recovery Fund	Proposed Budget	Approved Budget	Change	Adopted Budget
Resources				
Beginning Fund Balance	-	-	-	-
Local Sources	100,050	100,050	-	100,050
Intermediate Sources	-	-	-	-
State Sources	-	-	-	-
Federal Sources	-	-	-	-
Other Sources	-	-	-	-
<b>Total</b>	<b>100,050</b>	<b>100,050</b>	<b>-</b>	<b>100,050</b>

Requirements				
Instruction	-	-	-	-
Support Services	-	-	-	-
Enterprise and Community Services	-	-	-	-
Facilities Acquisition & Construction	100,050	100,050	-	100,050
Debt Service & Transfers Out	-	-	-	-
Contingency	-	-	-	-
Ending Fund Balance	-	-	-	-
<b>Total</b>	<b>100,050</b>	<b>100,050</b>	<b>-</b>	<b>100,050</b>

601 - Self Insurance Fund	Proposed Budget	Approved Budget	Change	Adopted Budget
Resources				
Beginning Fund Balance	2,766,407	2,766,407	-	2,766,407
Local Sources	2,933,616	2,933,616	2,589	2,936,205
Intermediate Sources	-	-	-	-
State Sources	195,833	195,833	-	195,833
Federal Sources	-	-	-	-
Other Sources	-	-	-	-
<b>Total</b>	<b>5,895,856</b>	<b>5,895,856</b>	<b>2,589</b>	<b>5,898,445</b>

Requirements				
Instruction	-	-	-	-
Support Services	3,171,617	3,171,617	-	3,171,617
Enterprise and Community Services	-	-	-	-
Facilities Acquisition & Construction	-	-	-	-
Debt Service & Transfers Out	-	-	-	-
Contingency	2,724,239	2,724,239	2,589	2,726,828
Ending Fund Balance	-	-	-	-
<b>Total</b>	<b>5,895,856</b>	<b>5,895,856</b>	<b>2,589</b>	<b>5,898,445</b>

## REPORT – June 17, 2013

### Expenditure Contracts Exceeding \$25,000 and through \$150,000

Portland Public Schools (“District”) Public Contracting Rules PPS-45-0200(6) (Authority to Approve District Contracts; Delegation of Authority to Superintendent) requires the Superintendent to submit to the Board of Education (“Board”) at the “Board’s monthly business meeting a list of all contracts in amounts exceeding \$25,000 and through \$150,000 approved by the Superintendent or designees within the preceding 30-day period under the Superintendent’s delegated authority.” Contracts meeting this criterion are listed below.

#### NEW CONTRACTS

<b>Contractor</b>	<b>Contract Term</b>	<b>Contract Type</b>	<b>Description of Services</b>	<b>Contract Amount</b>	<b>Responsible Administrator, Funding Source</b>
Apple Computers Inc.	5/15/13	Purchase Order PO 113390	Franklin and Madison: 25 10packs of Wi-Fi 16GB iPad 2	\$94,750	J. Klein Fund 101 Dept. 5581
Apple Computers Inc.	5/15/13	Purchase Order PO 113391	Kelly, Rigler, & Grout: 60 MacBook Air, 35 iMac, AppleCare service for computer labs.	\$104,022	J. Klein Fund 101 Dept. 5581
Riverside Publishing Co.	5/23/13	Purchase Order PO 113556	Iowa Assessments, Form E.	\$59,488	M. Goff Fund 101 Dept. 5487
Merchants Paper Company	5/24/13	Purchase Order PO 113596	840 cases 30% recycled paper, 840 cases 100% recycled paper.	\$49,501	J. Klein Fund 101 Dept. 5581
Riddell All American	6/2/13	Purchase Order PO 113711	Blanket purchase order for refurbishment and replacement of football helmets.	\$30,000	G. Ross Fund 101 Dept. 5423
Virco Manufacturing Corp.	6/5/13	Purchase Order PO 113744	Desks and tables for multiple sites.	\$26,134	T. Magliano Fund 191
Erica Huber	9/10/13 through 5/20/14	Personal Services PS 59803	Markham: Artist in Residence will instruct students through the 2013-2014 school year.	\$27,200	L. Dashiell Fund 101 Dept. 1170
Merchants Paper Co.	12/31/11 through 7/31/13	Materials Requirement MR 59818	District-wide: To provide disposable products on a requirements basis.	\$100,000	G. Grether-Sweeney Fund 202 Dept. 5570
World Book Inc.	06/20/13 through 06/20/15	Software Services SW 59813	District-wide: Two year subscription to World Book Online Encyclopedia.	\$100,000	M. Goff Fund 191 Dept. 5555 Proj. B2700
Professional Roof Consultants, Inc.	4/15/13 through 12/31/13	Personal Services PS 59783	Various: Conduct roof surveys at 3 sites; prepare bid –ready documents for recommended repairs at 16 sites.	\$49,680	T. Magliano Fund 191 Dept. 5597 Proj. F1032
Inline Commercial Construction	5/6/13 through 7/15/13	Construction C 59806	Chapman: Install fence and mow strip.	\$25,295	T. Magliano Fund 101 & 438 Dept. 1146 & 5597 Proj. J0755
Inline Commercial Construction	5/13/13 through 11/30/13	Construction C 59823	District-wide: Replace all wire glass found in exterior doors at 56 district buildings.	\$79,895	T. Magliano Fund 438 Dept. 5597 Proj. J0123
Beaverton Plumbing, Inc.	5/13/13 through 9/30/13	Construction C 59827	Marshall: Install dual flush toilets and valves.	\$61,292	T. Magliano Fund 421 Dept. 5597 Proj. E0116

Northwest Testing, Inc.	6/15/13 through 12/31/13	Personal Services PS 59826	Various: Materials testing services at Wilson, Laurelhurst, Lewis, Bridlemile, and Alameda.	\$41,241	J. Owens Fund 451 Dept. 1230, 1142, 1265, 1267 & 3126 Proj. DC105
OP SIS Architecture	6/10/13 through 2/28/14	Engineering Related Services ENG 59833	District-wide: Design guidelines and standards for the 2012 Bond program.	\$60,640	J. Owens Fund 451 Dept. 5511 Proj. DF120
Black Parent Initiative	4/1/13 through 6/30/13	Personal Services PS 59855	Roosevelt Cluster: Provide family engagement services targeted to increase communication and learning at home.	\$53,000	L. Poe Fund 101 Dept. 5431
Self Enhancement Inc.	4/1/13 through 6/30/13	Personal Services PS 59873	Jefferson Cluster: Provide family engagement services targeted to increase communication and learning at home.	\$86,557	L. Poe Fund 101 Dept. 5431
HP Northwest, dba Heintzberger Payne	7/1/13 through 3/31/19	Personal Services PS 59838	District-wide: Provide actuarial services with respect to the District's post-employment benefit plans.	\$80,750	N. Sullivan Fund 101 Dept. 5528
Beecher Carlson Insurance Agency, LLC	7/1/13 through 6/30/14	Personal Services PS-59858	District-wide: To provide insurance brokerage and risk management consultation services to the District for the 2013-14 fiscal year.	\$120,000	N. Sullivan Fund 101 & 601 Dept. 5540

### NEW INTERGOVERNMENTAL AGREEMENTS ("IGAs")

*No new IGA's*

### AMENDMENTS TO EXISTING CONTRACTS

Contractor	Contract Term	Contract Type	Description of Services	Amendment Amount, Contract Total	Responsible Administrator, Funding Source
NCM Contracting Group, LP	5/20/13 through 11/19/13	Service Requirements SR 55620 Amendment 7	District-wide: Hazardous Material Abatement on a requirements basis. RFP 08-1052	\$35,000 5-year total \$200,000	T. Magliano Fund 191 Dept. 5597 Proj. F1006
Performance Abatement Services	5/20/13 through 11/19/13	Service Requirements SR 55621 Amendment 7	District-wide: Hazardous Material Abatement on a requirements basis. RFP 08-1052	\$25,000 5-year total \$242,000	T. Magliano Fund 191 Dept. 5597 Proj. F1006
Professional Minority Group, Inc	5/20/13 through 11/19/13	Service Requirements SR 55622 Amendment 7	District-wide: Hazardous Material Abatement on a requirements basis. RFP 08-1052	\$25,000 5-year total \$135,000	T. Magliano Fund 191 Dept. 5597 Proj. F1006
Rose City Contracting	5/20/13 through 11/19/13	Service Requirements SR 55623 Amendment 11	District-wide: Hazardous Material Abatement on a requirements basis. RFP 08-1052	\$55,000 5-year total \$529,500	T. Magliano Fund 191 Dept. 5597 Proj. F1006
Air Filters Sales & Service – Camfill Farr	7/1/13 through 6/30/14	Service Requirements SR 57197 Amendment 6	District-wide: Provide air filters and replacement services for the heating systems in District buildings. RFP 09-064	\$120,000 4-year total \$643,445	T. Magliano Fund 101 Dept. 5592



Cole Industrial Inc.	5/31/13 through 12/31/13	Material Requirements MR 59081 Amendment 3	Multiple sites: Purchase of new burners for an additional 14 schools. ITB 12-1469	\$125,128 Project total \$983,558	T. Magliano Fund 101 Dept. 5597 Proj. J0101
Roosevelt High School Boosters and Anderson Construction Company	6/1/13 through 6/30/13	Materials M 57901 Amendment 3	Roosevelt: Final payment financing for the Teddy Roosevelt Athletics Complex.	\$65,000 Project total \$302,701	J. Owens Fund 405 Dept. 5511 Proj. C0100
MacColl, Busch, Sato PC	7/1/13 through 6/30/15	Legal Services LS 58453 Amendment 3	District-wide: Workers Compensation legal services to the District for two years.	\$140,000 4-year total \$310,000	N. Sullivan Fund 601 Dept. 5540
Youth Progress Association	4/1/13 through 6/30/13	Personal Services PS 59218 Amendment 2	Increase service by 10.26 slots for 175 days.	\$92,000 \$443,125	K. Wolfe Fund 101 Dept. 5485
DePaul Treatment Centers, Inc.	5/1/13 through 6/30/13	Personal Services PS 59219 Amendment 1	Increase service by 9.478 for 175 days.	\$85,000 \$336,125	K. Wolfe Fund 101 Dept. 5485
Yvonne Deckard	7/31/13 through 7/31/14	Personal Services PS 59313 Amendment 2	District-wide: Lead strategy development and implementation process for teacher contract negotiations and upcoming negotiations on labor agreements.	\$180,000 \$360,000	C. Smith Fund 101 Dept. 5402 & 5441

*N. Sullivan*

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

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June 17, 2013

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The Superintendent RECOMMENDS adoption of the following item:

Numbers 4769

**RESOLUTION No. 4769**

Recommended Decision to Rescind Non-Renew of Probationary Teacher of Employee 018209

**RECITAL**

On March 4, 2013, by resolution 4731, the Board of Education approved the recommendation of the Superintendent that the contract of Employee 018209 be non-renewed. On the advice of the Chief Human Resources Officer and the Regional Administrator, the Superintendent now recommends that the teacher below become a contract teacher for the 2013-2014 school year.

**RESOLUTION**

The Board of Education accepts the Superintendent's recommendation and by this resolution hereby rescinds the non-renewal of Employee 018209's contract and elects her as a Contract Teacher for the 2013-2014 school year, subject to the employment terms and conditions contained in the standard form contract approved by the legal counsel for the District.

*S. Murray*

Purchases, Bids, Contracts

The Superintendent RECOMMENDS adoption of the following items:

Numbers 4770 and 4771

**RESOLUTION No. 4770**

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

**RECITAL**

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

**RESOLUTION**

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

**NEW CONTRACTS**

No New Contracts

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

No New IGAs

**AMENDMENTS TO EXISTING CONTRACTS**

<b>Contractor</b>	<b>Contract Term</b>	<b>Contract Type</b>	<b>Description of Services</b>	<b>Amendment Amount, Contract Total</b>	<b>Responsible Administrator, Funding Source</b>
Research Triangle Institute	08/10/12 through 09/15/13	Revenue R-59277 Amendment 2	Increase funded amount for the Gear Up program data utilization award from the US Department of Education.	\$75,000 \$152,750	J. Klein Fund 205 Grant G1279

**LIMITED SCOPE REAL PROPERTY AGREEMENTS AND AMENDMENTS**

No Limited Scope Real Property Agreements or Amendments

*N. Sullivan*

**RESOLUTION No. 4771**

Personal / Professional Services, Goods, and Services Expenditure Contracts  
Exceeding \$150,000 for Delegation of Authority

**RECITAL**

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

**RESOLUTION**

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

**NEW CONTRACTS**

<b>Contractor</b>	<b>Contract Term</b>	<b>Contract Type</b>	<b>Description of Services</b>	<b>Contract Amount</b>	<b>Responsible Administrator, Funding Source</b>
Pacific Coast Fruit Company	03/01/13 through 02/28/14	Material Requirement MR 59846	Nutrition Services: Purchase produce on a requirements basis. RFP 2012-1533	\$1,300,000	G. Grether-Sweeney Fund 202 Dept. 5570
Goody Man Distributing, Inc.	01/01/13 through 12/31/13	Material Requirement MR 59876	Nutrition Services: Purchase bread products on a requirements basis. RFP 2012-1534	\$395,000	G. Grether-Sweeney Fund 202 Dept. 5570
Columbia Cascade Construction Services	06/18/13 through 10/13/13	Construction C 59xxx	Faubion K-8: Site work associated with the Portable Building Placement ITB 2013-1640	\$170,500	J. Owens Fund 451 Dept. 1248 Project DA004

**NEW INTERGOVERNMENTAL AGREEMENTS (“IGAs”)**

No New IGAs

**AMENDMENTS TO EXISTING CONTRACTS**

<b>Contractor</b>	<b>Contract Term</b>	<b>Contract Type</b>	<b>Description of Services</b>	<b>Amendment Amount, Total Contract</b>	<b>Responsible Administrator, Funding Source</b>
Roadrunner Home Bake, Inc	07/01/13 through 6/30/14	Material Requirement MR 58829	Nutrition Services: Purchase commodity processed products on a requirements basis. RFP 2010-1318.	\$280,000 \$870,000	G. Grether-Sweeney Fund 202 Dept. 5570
Tyson Prepared Foods	07/01/13 through 06/30/14	Material Requirement MR 58908	Nutrition Services: Purchase chicken products on a requirement basis. RFP 2010-1318.	\$460,000 \$910,000	G. Grether-Sweeney Fund 202 Dept. 5570
Smuckers Food Service	07/01/13 through 06/30/14	Material Requirement MR 58860	Nutrition Services: Purchase sandwich products on a requirements basis. RFP 2010-1318.	\$300,000 \$765,000	G. Grether-Sweeney Fund 202 Dept. 5570

*N. Sullivan*

Other Matters Requiring Board Approval

The Superintendent RECOMMENDS adoption of the following items:

Numbers 4772 through 4775



## **RESOLUTION No. 4772**

### Adoption of Revised Portland Public Schools Non-Discrimination Policy (1.80.020-P)

#### **RECITALS**

The Board of Education for Portland Public Schools reviewed recommendations to adopt changes to the Non-Discrimination Policy (1.80.020-P). The Board of Education is required to place any new policy on the District website for a 21-day public review. Having fulfilled this obligation and having received no public input on the proposed policy amendment, the Board of Education supports the proposed policy language for adoption.

#### **RESOLUTION**

##### **PROPOSED POLICY: (Revised) Portland Public Schools Non-Discrimination Policy (1.80.020-P)**

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 in all its educational and employment activities. The District prohibits discrimination 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.

*L. Poe*

## RESOLUTION No. 4773

### Adoption of Portland Public Schools Affirmative Action Policy (5.10.025-P)

#### RECITALS

The Board of Education for Portland Public Schools reviewed recommendations to adopt the Affirmative Action Policy (5.10.025-P). The Board of Education is required to place any new policy on the District website for a 21-day public review. Having fulfilled this obligation and having received no public input on the proposed policy amendment, the Board of Education supports the proposed policy language for adoption.

#### RESOLUTION

##### **PROPOSED POLICY:**

##### **Portland Public Schools Affirmative Action Policy (5.10.025-P)**

In order to close the racial achievement gap and better serve all students, Portland Public Schools staff must reflect the diversity of the students we serve. The Board of Education's Racial Educational Equity Policy (2.10.010-P) requires the school district to "recruit, employ, support and retain racially and linguistically diverse and culturally competent administrative, instructional and support personnel." Oregon state law, as articulated in the Minority Teachers Act, states that "the number of minority teachers, including administrators, employed by school districts and education service districts shall be approximately proportionate to the number of minority children enrolled in the public schools of this state." ORS § 342.437. This Affirmative Action Policy sets forth the Portland Public School District's prohibition against discrimination, directs the Superintendent to create and implement an Affirmative Action/Equal Employment Opportunity Plan (AA/EEO Plan), and establishes the goal that the District will come into compliance with goal established by the Oregon Minority Teachers Act.

##### Equal Employment Opportunity

The District shall provide equal employment opportunity for all applicants and staff in recruitment, hiring, assignment, training, retention, transfer and promotion. All employment actions shall be in accordance with the Board Policy of Non-Discrimination, 1.80.020. The District shall comply with all federal, state and local laws relevant to equal employment and non-discrimination.

The District will not tolerate retaliation against any individual who reports discrimination or harassment; or testifies, assists or participates in any manner in an investigation, proceeding or hearing, regardless of the outcome of the complaint. Conduct that would likely deter an individual from reporting or supporting a claim may constitute retaliation. Retaliation can occur even if the underlying complaint of harassment or discrimination is not substantiated.

The Superintendent shall designate the Chief Human Resources Officer to oversee compliance with equal employment and non-discrimination.

##### Affirmative Action – Employment

In order to comply with the Racial Educational Equity Policy and the Oregon Minority Teachers Act, the District will make meaningful efforts to recruit, employ, support and retain a qualified work force that reflects the diversity of our student body. The Board expects to see measurable progress every year in reaching the goal established by the Oregon Minority Teachers Act. This goal will both help ensure a work and school environment free from discrimination, and will contribute to enhanced student performance and the elimination of the achievement gap. To this end, the Board directs the Superintendent to develop and implement an AA/EEO Plan. The Board further directs the

Superintendent to designate an Affirmative Action Officer to oversee the implementation of, and compliance with, the AA/EEO Plan.

The Board expects the AA/EEO Plan to include affirmative measures designed to ensure equal employment opportunities. The AA/EEO Plan shall identify job groups that show the underutilization of staff based on race or gender within the District; set reasonable employment goals and timetables for increasing the diversity of our staff; and establish a plan of action to enable the District to reach these employment goals.

The goals articulated in this policy and the AA/EEO Plan are not rigid, inflexible quotas that must be met, but rather targets reasonably attainable by implementing best practices and applying good faith efforts. Neither this policy, nor the AA/EEO Plan, permit discrimination against any individual or group of individuals with respect to any employment opportunity for which the individual is qualified. Nothing herein is intended to sanction the discriminatory treatment of any person based on their protected status.

The Board further directs that all District employment policies, practices, and procedures will be examined periodically to ensure they are nondiscriminatory. These policies, practices and procedures are to be implemented by all administrative personnel, directors, personnel officers and anyone else who has responsibility for personnel functions. Equal employment opportunity and affirmative action are the responsibility of the entire District's workforce.

The Board directs the Superintendent to report annually on the implementation of this policy and the progress of the AA/EEO Plan.

Legal References: Minority Teacher Act, ORS 342.433 to 342.449; Federal and state laws prohibiting discrimination in employment, including, Title VII of the Civil Rights Act of 1964, the Americans with Disabilities Act, the Age Discrimination in Employment Act, and ORS Chapter 659A; No Child Left Behind Act of 2001, Pub. Law. 107-110 (2002)

*L. Poe*

**RESOLUTION No. 4774**

Amendment No. 3 to the 2012/13 Budget for School District No. 1J,  
Multnomah County, Oregon

**RECITALS**

- A. On June 25, 2012 the Board, by way of Resolution No. 4619, voted to adopt an annual budget for the Fiscal Year 2012/13 as required under Local Budget Law.
- B. Board Policy 8.10.030-AD, "Budget Reallocations – Post Budget Adoption," establishes the guidelines to ensure consistent and detailed communication on fiscal issues between the Superintendent and the Board of Education ("Board").
- C. Oregon Local Budget Law, ORS 294.471, allows budget changes after adoption under prescribed guidelines.
- D. On January 28, 2013 the Board, by way of Resolution No. 4708, amended the Fiscal Year 2012/13 budget.
- E. On April 1, 2013 the Board, by way of Resolution No. 4746, amended the Fiscal Year 2012/13 budget for a second time.
- F. This Amendment No. 3 will further revise the FY 2012/13 Adopted Budget under ORS 294.471 guidelines, which states the budget may be amended at a regular meeting of the governing body.
- G. Amendment No. 3 adjusts program allocations for funds to more accurately reflect expected revenues and to ensure adequate appropriation levels to cover all intended expenditures.
- H. Expenditures in one fund (Fund 438 Facilities Capital Project Fund) will be changed by more than 10% under this amendment. Local budget law requires a public hearing on this change.

**RESOLUTION**

- 1. Having held a public hearing on this amendment as required under local budget law, the Board hereby amends budgeted revenues and expenditure appropriation levels as summarized by Fund and Appropriation Level in Attachment A for the fiscal year beginning July 1, 2012.

*D. Wynde / N. Sullivan*

**ATTACHMENT "A" TO RESOLUTION No. 4774**

Fund 101 - General Fund	Adopted Budget	Amendment #1	Amendment #2	This Amendment	Amendment #3
Resources					
Beginning Fund Balance	26,657,817	30,924,691	30,924,691	-	30,924,691
Local Sources	265,494,250	263,583,251	263,583,251	-	263,583,251
Intermediate Sources	13,080,000	13,080,000	13,080,000	-	13,080,000
State Sources	156,532,000	156,532,000	156,532,000	-	156,532,000
Federal Sources	500,000	500,000	500,000	-	500,000
Other Sources	2,000,000	2,000,000	2,000,000	-	2,000,000
<b>Total</b>	<b>464,264,067</b>	<b>466,619,942</b>	<b>466,619,942</b>	<b>-</b>	<b>466,619,942</b>

Requirements					
Instruction	259,956,472	256,568,433	256,568,433	120,003	256,688,436
Support Services	174,725,913	176,836,631	176,836,631	(453,515)	176,383,116
Enterprise & Community Services	1,523,503	1,563,503	1,563,503	-	1,563,503
Facilities Acquisition & Construction	205,200	211,374	211,374	-	211,374
Debt Service & Transfers Out	10,184,033	10,583,711	10,583,711	27,662	10,611,373
Contingency	17,668,946	20,856,290	20,856,290	305,850	21,162,140
Ending Fund Balance	-	-	-	-	-
<b>Total</b>	<b>464,264,067</b>	<b>466,619,942</b>	<b>466,619,942</b>	<b>-</b>	<b>466,619,942</b>

Fund 205 - Grants Fund	Adopted Budget	Amendment #1	Amendment #2	This Amendment	Amendment #3
Resources					
Beginning Fund Balance	-	-	-	-	-
Local Sources	1,730,096	1,730,096	1,730,096	-	1,730,096
Intermediate Sources	-	-	-	-	-
State Sources	13,737,807	13,737,807	13,737,807	-	13,737,807
Federal Sources	53,847,532	53,847,532	53,847,532	-	53,847,532
Other Sources	-	-	-	-	-
<b>Total</b>	<b>69,315,435</b>	<b>69,315,435</b>	<b>69,315,435</b>	<b>-</b>	<b>69,315,435</b>

Requirements

Instruction	40,027,023	40,027,023	40,027,023	(600,000)	39,427,023
Support Services	26,679,259	26,679,259	26,679,259	-	26,679,259
Enterprise & Community Services	2,364,253	2,364,253	2,364,253	500,000	2,864,253
Facilities Acquisition & Construction	244,900	244,900	244,900	100,000	344,900
Debt Service & Transfers Out	-	-	-	-	-
Contingency	-	-	-	-	-
Ending Fund Balance	-	-	-	-	-
<b>Total</b>	<b>69,315,435</b>	<b>69,315,435</b>	<b>69,315,435</b>	<b>-</b>	<b>69,315,435</b>

<b>Fund 299 - Dedicated Resource Fund</b>	<b>Adopted Budget</b>	<b>Amendment #1</b>	<b>Amendment #2</b>	<b>This Amendment</b>	<b>Amendment #3</b>
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Resources

Beginning Fund Balance	6,466,182	6,466,182	6,466,182	(366,815)	6,099,367
Local Sources	8,636,800	8,636,800	8,636,800	-	8,636,800
Intermediate Sources	-	-	-	-	-
State Sources	-	-	-	-	-
Federal Sources	240,000	240,000	240,000	-	240,000
Other Sources	400,000	400,000	400,000	-	400,000
<b>Total</b>	<b>15,742,982</b>	<b>15,742,982</b>	<b>15,742,982</b>	<b>(366,815)</b>	<b>15,376,167</b>

Requirements

Instruction	13,125,618	13,125,618	13,125,618	(366,815)	12,758,803
Support Services	2,130,596	2,130,596	2,130,596	(30,000)	2,100,596
Enterprise & Community Services	62,990	62,990	62,990	30,000	92,990
Facilities Acquisition & Construction	423,778	423,778	423,778	-	423,778
Debt Service & Transfers Out	-	-	-	-	-
Contingency	-	-	-	-	-
Ending Fund Balance	-	-	-	-	-
<b>Total</b>	<b>15,742,982</b>	<b>15,742,982</b>	<b>15,742,982</b>	<b>(366,815)</b>	<b>15,376,167</b>

Fund 320 - Full Faith and Credit Debt Service Fund	Adopted Budget	Amendment #1	Amendment #2	This Amendment	Amendment #3
Resources					
Beginning Fund Balance	-	-	-	-	-
Local Sources	-	-	-	-	-
Intermediate Sources	-	-	-	-	-
State Sources	-	-	-	-	-
Federal Sources	226,843	226,843	226,843	(9,662)	217,181
Other Sources	1,111,335	1,111,335	1,111,335	9,662	1,120,997
<b>Total</b>	<b>1,338,178</b>	<b>1,338,178</b>	<b>1,338,178</b>	<b>-</b>	<b>1,338,178</b>

Requirements					
Instruction	-	-	-	-	-
Support Services	-	-	-	-	-
Enterprise & Community Services	-	-	-	-	-
Facilities Acquisition & Construction	-	-	-	-	-
Debt Service & Transfers Out	1,338,178	1,338,178	1,338,178	-	1,338,178
Contingency	-	-	-	-	-
Ending Fund Balance	-	-	-	-	-
<b>Total</b>	<b>1,338,178</b>	<b>1,338,178</b>	<b>1,338,178</b>	<b>-</b>	<b>1,338,178</b>

Fund 438 - Facilities Capital Project Fund	Adopted Budget	Amendment #1	Amendment #2	This Amendment	Amendment #3
Resources					
Beginning Fund Balance	-	832,251	832,251	-	832,251
Local Sources	-	-	-	-	-
Intermediate Sources	-	-	-	-	-
State Sources	-	500,000	500,000	-	500,000
Federal Sources	-	-	-	-	-
Other Sources	18,362,947	18,762,625	18,762,625	2,063,350	20,825,975
<b>Total</b>	<b>18,362,947</b>	<b>20,094,876</b>	<b>20,094,876</b>	<b>2,063,350</b>	<b>22,158,226</b>

Requirements					
Instruction	-	-	-	-	-
Support Services	-	-	-	-	-
Enterprise & Community Services	-	-	-	-	-
Facilities Acquisition & Construction	18,362,947	20,094,876	20,094,876	2,063,350	22,158,226
Debt Service & Transfers Out	-	-	-	-	-
Contingency	-	-	-	-	-
Ending Fund Balance	-	-	-	-	-
<b>Total</b>	<b>18,362,947</b>	<b>20,094,876</b>	<b>20,094,876</b>	<b>2,063,350</b>	<b>22,158,226</b>



## RESOLUTION No. 4775

### Impose Taxes and Adoption of the FY 2013/14 Budget for School District No. 1J, Multnomah County, Oregon

#### RECITALS

- A. Oregon Local Budget Law, ORS 294.428, requires each legal jurisdiction's Budget Committee approve a budget and specify *ad valorem* property tax rate for all funds.
- B. The Board of Education ("Board") appointed a Citizen Budget Review Committee ("CBRC") to review the Proposed Budget and current year expenditures of the existing Local Option Levy. The CBRC acts in an advisory capacity to the Board.
- C. On May 13, 2013, the Budget Committee received testimony and a report on the current year Local Option Levy expenditures, and testimony and budget recommendations from the CBRC.
- D. On May 20, 2013, by way of Resolution No. 4759, and under the provisions of Oregon Local Budget Law (ORS Ch. 294), the Budget Committee for School District No. 1J, Multnomah County, Oregon ("District"), approved the FY 2013/14 budget and imposed taxes.
- E. Oregon Local Budget Law, ORS 294.431, requires submission of the budget document to the Tax Supervising Commission ("TSCC") by May 15 of each year. PPS applied for, and was granted an extension to this deadline, and submitted the PPS budget to TSCC as required.
- F. The TSCC held a public hearing on the Approved Budget on June 17, 2013.
- G. ORS 457.010(4)(a) provides the opportunity for a school district to exclude from urban renewal divide-the-taxes that amount with a statutory rate limit on July 1, 2003, that is greater than \$4.50 per \$1,000 of assessed value, to the extent that the rate limit was increased under section 11 (5)(d), Article XI of the Oregon Constitution and, property tax revenue from said increase is excluded from local revenues, as that term is used in ORS Chapter 327, and provided that the school district notifies the county assessor of the rate to be excluded for the current fiscal year not later than July 15.
- H. Portland Public Schools has a statutory rate limit that in is in excess of the \$4.50 limitation that includes an increase under section 11 (5) (d), Article XI of the Oregon Constitution.

#### RESOLUTION

1. The District's Board of Education hereby adopts the budget for the fiscal year 2013/14, as summarized in Attachment "A", in the total amount of \$833,134,013.
2. The Board resolves that the District hereby imposes the taxes provided for in the adopted budget:
  - a. At the rate of \$5.2781 per \$1,000 of assessed value for operations;
  - b. At the rate of \$1.9900 per \$1,000 of assessed value for local option tax for operations;
  - c. In the amount of \$46,007,694 for exempt bonds.

And that these taxes are hereby imposed and categorized for tax year 2013/14 upon the assessed value of all taxable property within the district.

3. Taxes are hereby imposed and categorized as for tax year 2013/14 upon the taxable assessed value of all taxable property in the District, as follows:

	<u>Education Limitation</u>	<u>Excluded from Limitation</u>
Permanent Rate Tax Levy	\$5.2781/\$1,000 of assessed valuation	
Local Option Rate Tax Levy	\$1.9900/\$1,000 of assessed valuation	
Bonded Debt Levy		\$46,007,694

4. The Board further resolves that \$0.5038 per \$1,000 of taxable assessed value of the permanent rate tax levy noted above is excluded from division of tax calculations, as the Permanent Rate Tax Levy attributable to the increase provided in section 11 (5)(d), Article XI of the Oregon Constitution (such increase is a result of the expired Gap Tax Levy). The District will notify the county assessors that for the 2013-14 fiscal year \$0.5038 of the District's permanent tax rate levy is to be excluded from urban division of tax calculations under the provisions of ORS 457.010(4)(a)(D).

*D. Wynde / N. Sullivan*

**ATTACHMENT "A" TO RESOLUTION No. 4775**

Fund	Instruction	Support Services	Enterprise & Community Services	Facilities Acquisition & Construction	Debt Service	Transfers Out	Contingency	Ending Fund Balance	Fund Total
Fund 101	278,962,739	181,866,916	1,640,220	-	-	4,906,785	20,184,089	-	487,560,749
Fund 201	8,954,082	-	-	-	-	-	-	3,260,830	12,214,912
Fund 202	-	-	18,685,858	-	-	-	-	1,997,522	20,683,380
Fund 205	37,105,815	26,007,073	1,983,566	-	-	-	-	-	65,096,454
Fund 225	-	-	-	-	-	1,900,000	-	11,869,583	13,769,583
Fund 299	14,029,587	1,920,240	65,906	1,974,229	-	-	-	-	17,989,962
Fund 306	-	-	-	-	1,448,700	-	-	-	1,448,700
Fund 307	-	-	-	-	1,587,362	-	-	-	1,587,362
Fund 308	-	-	-	-	38,134,327	-	-	-	38,134,327
Fund 309	-	-	-	-	76,284	-	-	-	76,284
Fund 320	-	-	-	-	1,321,159	-	-	-	1,321,159
Fund 350	-	-	-	-	43,262,232	-	-	-	43,262,232
Fund 404	-	-	-	9,083,033	-	-	-	-	9,083,033
Fund 405	-	-	-	2,433,901	-	-	-	-	2,433,901
Fund 407	-	660,351	-	-	-	-	99,954	-	760,305
Fund 420	-	-	-	607,000	-	-	-	-	607,000
Fund 435	-	-	-	1,434,127	-	-	-	-	1,434,127
Fund 438	-	-	-	5,882,955	-	-	-	-	5,882,955
Fund 445	-	-	-	169,031	-	-	-	-	169,031
Fund 450	-	-	-	36,304,899	-	-	67,315,163	-	103,620,062
Fund 480	-	-	-	100,050	-	-	-	-	100,050
Fund 601	-	3,171,617	-	-	-	-	2,726,828	-	5,898,445
<b>Total</b>	<b>\$ 339,052,223</b>	<b>\$ 213,626,197</b>	<b>\$ 22,375,550</b>	<b>\$ 57,989,225</b>	<b>\$ 85,830,064</b>	<b>\$ 6,806,785</b>	<b>\$ 90,326,034</b>	<b>\$ 17,127,935</b>	<b>\$ 833,134,013</b>