

**University of Massachusetts Amherst**

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**From the Selected Works of Kathryn A. McDermott**

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2009

# Portland Public Schools' TASAP Application

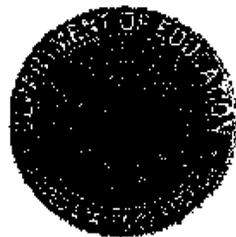
Portland Public Schools, *Portland Public Schools*



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# **U.S. Department of Education**

**Washington, D.C. 20202-5335**



## **APPLICATION FOR GRANTS UNDER THE**

**TECHNICAL ASSISTANCE FOR SCHOOL ASSIGNMENT PLANS  
CFDA # 84.004F  
PR/Award # S004F090014**

OMB No. 1894-0006, Expiration Date: 09/30/2011  
Closing Date: AUG 21, 2009

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This application was generated using the PDF functionality. The PDF functionality automatically numbers the pages in this application. Some pages/sections of this application may contain 2 sets of page numbers, one set created by the applicant and the other set created by e-Application's PDF functionality. Page numbers created by the e-Application PDF functionality will be preceded by the letter e (for example, e1, e2, e3, etc.).

Application for Federal Assistance SF-424		Version 02
* 1. Type of Submission <input type="checkbox"/> Preapplication <input checked="" type="checkbox"/> Application <input type="checkbox"/> Changed/Corrected Application	* 2. Type of Application: * If Revision, select appropriate letter(s): <input checked="" type="checkbox"/> New <input type="checkbox"/> Continuation      * Other (Specify) <input type="checkbox"/> Revision	
* 3. Date Received: 8/21/2009	4. Applicant Identifier:	
5a. Federal Entity Identifier:	* 5b. Federal Award Identifier: NA	
<b>State Use Only:</b>		
6. Date Received by State:	7. State Application Identifier:	
<b>8. APPLICANT INFORMATION:</b>		
* a. Legal Name: School District 1J Multnomah County		
* b. Employer/Taxpayer Identification Number (EIN/TIN): 936000830	* c. Organizational DUNS: 054971650	
<b>d. Address:</b>		
* Street1:	501 N. Dixon Street	
Street2:		
* City:	Portland	
County:		
State:	OR	
Province:		
* Country:	USA	
* Zip / Postal Code:	97227	
<b>e. Organizational Unit:</b>		
Department Name:	Division Name:	
Superintendent		
<b>f. Name and contact information of person to be contacted on matters involving this application:</b>		
Prefix:	* First Name:	Susan
Middle Name:		

\* Last Name: Jordan

Suffix:

Title: Senior Development Manager

Organizational Affiliation:

\* Telephone Number: (503)916-3447 Fax Number: (503)916-3255

\* Email: SJORDAN@PPS.K12.OR.US

Application for Federal Assistance SF-424

Version 02

**9. Type of Applicant 1: Select Applicant Type:**

G: Independent School District

Type of Applicant 2: Select Applicant Type:

Type of Applicant 3: Select Applicant Type:

\* Other (specify):

**10. Name of Federal Agency:**

U.S. Department of Education

**11. Catalog of Federal Domestic Assistance Number:**

84.004F

CFDA Title:

Technical Assistance for School Assignment Plans

**\* 12. Funding Opportunity Number:**

CFDA Number 84.004F

Title:

Technical Assistance for Student Assignment Plans

**13. Competition Identification Number:**

Title:

US Department of Education Office of Elementary and Secondary Education  
Technical Assistance for Student Assignment Plans

**14. Areas Affected by Project (Cities, Counties, States, etc.):**

**\* 15. Descriptive Title of Applicant's Project:**

Technical Assistance for Student Assignment Plans in Portland (TASAPP)

Attach supporting documents as specified in agency instructions.

**Attachment:**

Title :

File :

**Attachment:**

Title :

File :

**Attachment:**

Title :

File :

**Application for Federal Assistance SF-424**

Version 02

**16. Congressional Districts Of:**

\* a. Applicant: OR-003

\* b. Program/Project: OR-003

Attach an additional list of Program/Project Congressional Districts if needed.

**Attachment:**

Title :

File :

**17. Proposed Project:**

\* a. Start Date: 9/1/2009

\* b. End Date: 8/31/2011

**18. Estimated Funding (\$):**

a. Federal	\$ 249977
b. Applicant	\$ 0
c. State	\$
d. Local	\$
e. Other	\$
f. Program Income	\$
g. TOTAL	\$ 249977

**\* 19. Is Application Subject to Review By State Under Executive Order 12372 Process?**

a. This application was made available to the State under the Executive Order 12372 Process for review on .

b. Program is subject to E.O. 12372 but has not been selected by the State for review.

c. Program is not covered by E.O. 12372.

**\* 20. Is the Applicant Delinquent On Any Federal Debt? (If "Yes", provide explanation.)**

Yes  No

21. \*By signing this application, I certify (1) to the statements contained in the list of certifications\*\* and (2) that the statements herein are true, complete and accurate to the best of my knowledge. I also provide the required assurances\*\* and agree to comply with any resulting terms if I accept an award. I am aware that any false, fictitious, or fraudulent statements or claims may subject me to criminal, civil, or administrative penalties. (U.S. Code, Title 218, Section 1001)

\*\* I AGREE

\*\* The list of certifications and assurances, or an internet site where you may obtain this list, is contained in the announcement or agency specific instructions.

**Authorized Representative:**

Prefix: Ms. \* First Name: Susan  
Middle Name:  
\* Last Name: Jordan  
Suffix:

Title: Senior Development Manager

\* Telephone Number: (503)916-3447 Fax Number: (503)916-3255

\* Email: SJORDAN@PPS.K12.OR.US

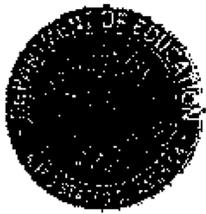
\* Signature of Authorized Representative: \* Date Signed:

**Application for Federal Assistance SF-424**

Version 02

**\* Applicant Federal Debt Delinquency Explanation**

The following field should contain an explanation if the Applicant organization is delinquent on any Federal Debt. Maximum number of characters that can be entered is 4,000. Try and avoid extra spaces and carriage returns to maximize the availability of space.



U.S. DEPARTMENT OF EDUCATION

BUDGET INFORMATION

NON-CONSTRUCTION PROGRAMS

OMB Control Number: 1894-0008

Expiration Date: 02/28/2011

Name of Institution/Organization:  
School District 1J Multnomah Co...

Applicants requesting funding for only one year should complete the column under "Project Year 1." Applicants requesting funding for multi-year grants should complete all applicable columns. Please read all instructions before completing form.

SECTION A - BUDGET SUMMARY

U.S. DEPARTMENT OF EDUCATION FUNDS

Budget Categories	Project Year 1(a)	Project Year 2 (b)	Project Year 3 (c)	Project Year 4 (d)	Project Year 5 (e)	Total (f)
1. Personnel	\$ 20,000	\$ 23,500	\$ 0	\$ 0	\$ 0	\$ 43,500
2. Fringe Benefits	\$ 6,373	\$ 7,217	\$ 0	\$ 0	\$ 0	\$ 13,590
3. Travel	\$ 6,450	\$ 9,030	\$ 0	\$ 0	\$ 0	\$ 15,480
4. Equipment	\$ 0	\$ 0	\$ 0	\$ 0	\$ 0	\$ 0
5. Supplies	\$ 18,500	\$ 3,400	\$ 0	\$ 0	\$ 0	\$ 21,900
6. Contractual	\$ 85,500	\$ 50,750	\$ 0	\$ 0	\$ 0	\$ 136,250
7. Construction	\$ 0	\$ 0	\$ 0	\$ 0	\$ 0	\$ 0
8. Other	\$ 2,000	\$ 2,000	\$ 0	\$ 0	\$ 0	\$ 4,000
9. Total Direct Costs (lines 1-8)	\$ 138,823	\$ 95,897	\$ 0	\$ 0	\$ 0	\$ 234,720
10. Indirect Costs*	\$ 9,024	\$ 6,233	\$ 0	\$ 0	\$ 0	\$ 15,257
11. Training Stipends	\$ 0	\$ 0	\$ 0	\$ 0	\$ 0	\$ 0
12. Total Costs (lines 9-11)	\$ 147,847	\$ 102,130	\$ 0	\$ 0	\$ 0	\$ 249,977

\*Indirect Cost Information (To Be Completed by Your Business Office):

If you are requesting reimbursement for indirect costs on line 10, please answer the following questions:

(1) Do you have an Indirect Cost Rate Agreement approved by the Federal government?  Yes  No

(2) If yes, please provide the following information:

Period Covered by the Indirect Cost Rate Agreement: From: 7/1/2008 To: 6/30/2009 (mm/dd/yyyy)

Approving Federal agency:  ED  Other (please specify): Oregon Department of Education The Indirect Cost Rate is 6.5%

(3) For Restricted Rate Programs (check one) -- Are you using a restricted indirect cost rate that:

Is included in your approved Indirect Cost Rate Agreement? or,  Complies with 34 CFR 76.564(c)(2)? The Restricted Indirect Cost Rate is 0%



**U.S. DEPARTMENT OF EDUCATION**  
**BUDGET INFORMATION**  
**NON-CONSTRUCTION PROGRAMS**

OMB Control Number: 1894-0008

Expiration Date: 02/28/2011

Name of Institution/Organization:  
 School District 1J Multnomah Co...

Applicants requesting funding for only one year should complete the column under "Project Year 1." Applicants requesting funding for multi-year grants should complete all applicable columns. Please read all instructions before completing form.

**SECTION B - BUDGET SUMMARY**  
**NON-FEDERAL FUNDS**

Budget Categories	Project Year 1(a)	Project Year 2 (b)	Project Year 3 (c)	Project Year 4 (d)	Project Year 5 (e)	Total (f)
1. Personnel	\$ 0	\$ 0	\$ 0	\$ 0	\$ 0	\$ 0
2. Fringe Benefits	\$ 0	\$ 0	\$ 0	\$ 0	\$ 0	\$ 0
3. Travel	\$ 0	\$ 0	\$ 0	\$ 0	\$ 0	\$ 0
4. Equipment	\$ 0	\$ 0	\$ 0	\$ 0	\$ 0	\$ 0
5. Supplies	\$ 0	\$ 0	\$ 0	\$ 0	\$ 0	\$ 0
6. Contractual	\$ 0	\$ 0	\$ 0	\$ 0	\$ 0	\$ 0
7. Construction	\$ 0	\$ 0	\$ 0	\$ 0	\$ 0	\$ 0
8. Other	\$ 0	\$ 0	\$ 0	\$ 0	\$ 0	\$ 0
9. Total Direct Costs (lines 1-8)	\$ 0	\$ 0	\$ 0	\$ 0	\$ 0	\$ 0
10. Indirect Costs	\$ 0	\$ 0	\$ 0	\$ 0	\$ 0	\$ 0
11. Training Stipends	\$ 0	\$ 0	\$ 0	\$ 0	\$ 0	\$ 0
12. Total Costs (lines 9-11)	\$ 0	\$ 0	\$ 0	\$ 0	\$ 0	\$ 0

## ASSURANCES - NON-CONSTRUCTION PROGRAMS

Standard Form 424B (Rev. 7-97)

Public reporting burden for this collection of information is estimated to average 15 minutes per response, including time for reviewing instructions, searching existing data sources, gathering and maintaining the data needed, and completing and reviewing the collection of information. Send comments regarding the burden estimate or any other aspect of this collection of information, including suggestions for reducing this burden to the Office of Management and Budget, Paperwork Reduction Project (0348-0040), Washington DC 20503.

**PLEASE DO NOT RETURN YOUR COMPLETED FORM TO THE OFFICE OF MANAGEMENT AND BUDGET. SEND IT TO THE ADDRESS PROVIDED BY THE SPONSORING AGENCY.**

**NOTE:** Certain of these assurances may not be applicable to your project or program. If you have questions, please contact the awarding agency. Further, certain Federal awarding agencies may require applicants to certify to additional assurances. If such is the case, you will be notified.

As the duly authorized representative of the applicant, I certify that the applicant:

1. Has the legal authority to apply for Federal assistance, and the institutional, managerial and financial capability (including funds sufficient to pay the non-Federal share of project cost) to ensure proper planning, management, and completion of the project described in this application.
2. Will give the awarding agency, the Comptroller General of the United States, and if appropriate, the State, through any authorized representative, access to and the right to examine all records, books, papers, or documents related to the award; and will establish a proper accounting system in accordance with generally accepted accounting standards or agency directives.
3. Will establish safeguards to prohibit employees from using their positions for a purpose that constitutes or presents the appearance of personal or organizational conflict of interest, or personal gain.
4. Will initiate and complete the work within the applicable time frame after receipt of approval of the awarding agency.
5. Will comply with the Intergovernmental Personnel Act of 1970 (42 U.S.C. "4728-4763) relating to prescribed standards for merit systems for programs funded under one of the 19 statutes or regulations specified in Appendix A of OPM's Standards for a Merit System of Personnel Administration (5 C.F.R. 900, Subpart F).
6. Will comply with all Federal statutes relating to nondiscrimination. These include but are not limited to: (a) Title VI of the Civil Rights Act of 1964 (P.L. 88-352) which prohibits discrimination on the basis of race, color or national origin; (b) Title IX of the Education Amendments of 1972, as amended (20 U.S.C. "1681-1683, and 1685-1686), which prohibits discrimination on the basis of sex; (c) Section 504 of the Rehabilitation Act of 1973, as amended (29 U.S.C. '794), which prohibits discrimination on the basis of handicaps; (d) the Age Discrimination Act
9. Will comply, as applicable, with the provisions of the Davis-Bacon Act (40 U.S.C. "276a to 276a-7), the Copeland Act (40 U.S.C. '276c and 18 U.S.C. "874) and the Contract Work Hours and Safety Standards Act (40 U.S.C. " 327-333), regarding labor standards for federally assisted construction sub-agreements.
10. Will comply, if applicable, with flood insurance purchase requirements of Section 102(a) of the Flood Disaster Protection Act of 1973 (P.L. 93-234) which requires recipients in a special flood hazard area to participate in the program and to purchase flood insurance if the total cost of insurable construction and acquisition is \$10,000 or more.
11. Will comply with environmental standards which may be prescribed pursuant to the following: (a) institution of environmental quality control measures under the National Environmental Policy Act of 1969 (P.L. 91-190) and Executive Order (EO) 11514; (b) notification of violating facilities pursuant to EO 11738; (c) protection of wetlands pursuant to EO 11990; (d) evaluation of flood hazards in floodplains in accordance with EO 11988; (e) assurance of project consistency with the approved State management program developed under the Coastal Zone Management Act of 1972 (16 U.S.C. "1451 et seq.); (f) conformity of Federal actions to State (Clear Air) Implementation Plans under Section 176(c) of the Clear Air Act of 1955, as amended (42 U.S.C. "7401 et seq.); (g) protection of underground sources of drinking water under the Safe Drinking Water Act of 1974, as amended, (P.L. 93-523); and (h) protection of endangered species under the Endangered Species Act of 1973, as amended, (P.L. 93-205).
12. Will comply with the Wild and Scenic Rivers Act of 1968 (16 U.S.C. "1721 et seq.) related to protecting components or potential components of the national wild and scenic rivers system.
13. Will assist the awarding agency in assuring compliance

of 1975, as amended (42 U.S.C. " 6101-6107), which prohibits discrimination on the basis of age; (e) the Drug Abuse Office and Treatment Act of 1972 (P.L. 92-255), as amended, relating to nondiscrimination on the basis of drug abuse; (f) the Comprehensive Alcohol Abuse and Alcoholism Prevention, Treatment and Rehabilitation Act of 1970 (P.L. 91-616), as amended, relating to nondiscrimination on the basis of alcohol abuse or alcoholism; (g) " 523 and 527 of the Public Health Service Act of 1912 (42 U.S.C. " 290 dd-3 and 290 ee 3), as amended, relating to confidentiality of alcohol and drug abuse patient records; (h) Title VIII of the Civil Rights Act of 1968 (42 U.S.C. ' 3601 et seq.), as amended, relating to nondiscrimination in the sale, rental or financing of housing; (i) any other nondiscrimination provisions in the specific statute(s) under which application for Federal assistance is being made; and (j) the requirements of any other nondiscrimination statute(s) which may apply to the application.

7. Will comply, or has already complied, with the requirements of Titles II and III of the uniform Relocation Assistance and Real Property Acquisition Policies Act of 1970 (P.L. 91-646) which provide for fair and equitable treatment of persons displaced or whose property is acquired as a result of Federal or federally assisted programs. These requirements apply to all interests in real property acquired for project purposes regardless of Federal participation in purchases.
8. Will comply, as applicable, with the provisions of the Hatch Act (5 U.S.C. "1501-1508 and 7324-7328) which limit the political activities of employees whose principal employment activities are funded in whole or in part with Federal funds.

with Section 106 of the National Historic Preservation Act of 1966, as amended (16 U.S.C. '470), EO 11593 (identification and protection of historic properties), and the Archaeological and Historic Preservation Act of 1974 (16 U.S.C. "469a-1 et seq.),

14. Will comply with P.L. 93-348 regarding the protection of human subjects involved in research, development, and related activities supported by this award of assistance.
15. Will comply with the Laboratory Animal Welfare Act of 1966 (P.L. 89-544, as amended, 7 U.S.C. "2131 et seq.) pertaining to the care, handling, and treatment of warm blooded animals held for research, teaching, or other activities supported by this award of assistance.
16. Will comply with the Lead-Based Paint Poisoning Prevention Act (42 U.S.C. "4801 et seq.) which prohibits the use of lead- based paint in construction or rehabilitation of residence structures.
17. Will cause to be performed the required financial and compliance audits in accordance with the Single Audit Act Amendments of 1996 and OMB Circular No. A-133, "Audits of States, Local Governments, and Non-Profit Organizations."
18. Will comply with all applicable requirements of all other Federal laws, executive orders, regulations and policies governing this program.

<b>Signature of Authorized Certifying Representative:</b>
<b>Name of Authorized Certifying Representative:</b> Zeke Smith
<b>Title:</b> Chief of Staff
<b>Date Submitted:</b> 08/20/2009





## Section 427 of GEPA

### NOTICE TO ALL APPLICANTS

The purpose of this enclosure is to inform you about a new provision in the Department of Education's General Education Provisions Act (GEPA) that applies to applicants for new grant awards under Department programs. This provision is Section 427 of GEPA, enacted as part of the Improving America's Schools Act of 1994 (Public Law (P. L.) 103-382).

#### **To Whom Does This Provision Apply?**

Section 427 of GEPA affects applicants for new grant awards under this program. **ALL APPLICANTS FOR NEW AWARDS MUST INCLUDE INFORMATION IN THEIR APPLICATIONS TO ADDRESS THIS NEW PROVISION IN ORDER TO RECEIVE FUNDING UNDER THIS PROGRAM.**

(If this program is a State-formula grant program, a State needs to provide this description only for projects or activities that it carries out with funds reserved for State-level uses. In addition, local school districts or other eligible applicants that apply to the State for funding need to provide this description in their applications to the State for funding. The State would be responsible for ensuring that the school district or other local entity has submitted a sufficient section 427 statement as described below.)

#### **What Does This Provision Require?**

Section 427 requires each applicant for funds (other than an individual person) to include in its application a description of the steps the applicant proposes to take to ensure equitable access to, and participation in, its Federally-assisted program for students, teachers, and other program beneficiaries with special needs. This provision allows applicants discretion in developing the required description. The statute highlights six types of barriers that can impede equitable access or participation: gender, race, national origin, color, disability, or age. Based on local circumstances, you should determine whether these or other barriers may prevent your students, teachers, etc. from such access or participation in, the Federally-funded project or activity. The description in your application of steps to be taken to overcome these barriers need not be lengthy; you may provide a clear and succinct

description of how you plan to address those barriers that are applicable to your circumstances. In addition, the information may be provided in a single narrative, or, if appropriate, may be discussed in connection with related topics in the application.

Section 427 is not intended to duplicate the requirements of civil rights statutes, but rather to ensure that, in designing their projects, applicants for Federal funds address equity concerns that may affect the ability of certain potential beneficiaries to fully participate in the project and to achieve to high standards. Consistent with program requirements and its approved application, an applicant may use the Federal funds awarded to it to eliminate barriers it identifies.

#### **What are Examples of How an Applicant Might Satisfy the Requirement of This Provision?**

The following examples may help illustrate how an applicant may comply with Section 427.

- (1) An applicant that proposes to carry out an adult literacy project serving, among others, adults with limited English proficiency, might describe in its application how it intends to distribute a brochure about the proposed project to such potential participants in their native language.
- (2) An applicant that proposes to develop instructional materials for classroom use might describe how it will make the materials available on audio tape or in braille for students who are blind.
- (3) An applicant that proposes to carry out a model science program for secondary students and is concerned that girls may be less likely than boys to enroll in the course, might indicate how it intends to conduct "outreach" efforts to girls, to encourage their enrollment.

We recognize that many applicants may already be implementing effective steps to ensure equity of access and participation in their grant programs, and we appreciate your cooperation in responding to the requirements of this provision.

### **Estimated Burden Statement for GEPA Requirements**

According to the Paperwork Reduction Act of 1995, no persons are required to respond to a collection of information unless such collection displays a valid OMB control number. The valid OMB control number for this information collection is **1894-0005**. The time required to complete this information collection is estimated to average 1.5 hours per response, including the time to review instructions, search existing data resources, gather the data needed, and complete and review the information collection. **If you have any comments concerning the accuracy of the time estimate(s) or suggestions for improving this form, please write to: U.S. Department of Education, 400 Maryland Avenue, S.W., Washington, D.C. 20202-4537.**

Applicants should use this section to address the GEPA provision.

**Attachment:**

Title : GEPA Statement

File : Y:\My Documents\Grants\Student Assignment\Appendices\GEPA Statement.doc

**Portland Public Schools  
Multnomah County School District 1**

***Equitable Access and Participation: General Education Provisions Act (GEPA)***

Portland Public Schools has a longstanding commitment to educational excellence and to ensuring that all students, faculty and staff, administrators, parents and family, and members of the community have equitable access to all facets and components of a quality educational system that reflects that excellence. The District's commitment to removing or reducing barriers to access and participation is systemic, involving each of the 85 schools and the more than 100 individual sites, as well as departments, and offices.

Portland Public Schools ensures equal access and participation to all persons regardless of their race, color, ethnicity, religion, national origin, gender, age, citizenship status, or disability to all federally-supported programs and services and is compliant with all relevant local, county, state, and federal laws and regulations. This includes enrollment in educational programs and employment of all district faculty, administrators, and staff. Additionally, the district pursues and establishes partnerships and other relationships with external agencies, offices, consultants, businesses, and other entities that also support equal access and participation.

District-wide and program-specific solutions to traditional barriers are identified below:

<b>Traditional Barrier</b>	<b>Barrier Solution</b>	<b>Responsible Party</b>
Gender, race, national origin, color, disability, and age	Full and equal access and participation in education	District-level Compliance Officer in the Office of Student, Family, and School Support
	Full and equal access and participation in employment	District-level Chief Human Resources Officer

Portland Public Schools additionally ensures equal access and participation in specific areas including:

<b>Barrier</b>	<b>Barrier Solution</b>	<b>Responsible Party</b>
Physical disability	Full ADA compliance; curb cuts, reserved parking	Principal
	TDD telephone system	Informational Technology Department
	Tape players, assisted technologies, modified equipment	Principal, IT Department
	alternative formats (Braille printer/embosser, scanner and software), note taking device	Principal, Student Services Department, IT Department
	Speech prompting device	

Learning disability	Special Education faculty and staff	Director of Special Education, School Principal, Information Technology Department
	Tape recorders, reading aids, electronic books, alternative formats, note taking device	
	Organizational aids, electronic organizers	
Emotional disability, Behavioral disability	Special Education and Counseling staffs	School Principal
English-Language deficiency	English-language immersion strategies in classrooms	Director, ESL and Bilingual Programs
	Interpreters and translators	Director, ESL and Bilingual Programs On-line service (Transact) generates parent notices in several languages.
	Multi-lingual communication	Parent Liaisons in high-need schools
	Tutoring for students/ language lab ESL programs for parents	Director, ESL and Bilingual Programs School Principals
Migrant status	Migrant Education office	Director, Migrant Education
	Tutoring for students	Director, Migrant Education, school principal
	Access to services	Director, Migrant Education
Low-income	Resources to provide food and clothing	Counselors, school nurse, Title I Director, Student Services Department
	On-site nurse and referrals for health, dental care, and eye glasses	
	Access to Multnomah County services and resources	
Access to transportation	District-provided buses for extra- curricular classes for students	Principal, Site Project Directors
	District vehicles/buses adapted for special populations	Student Services, Transportation

School and district personnel will address these and any other barriers to participation and make all reasonable accommodations to increase access. Students, parents and family, community members, teachers, and other beneficiaries should take any of the following steps to eliminate or reduce barriers to program and activity participation: (a) contact school personnel connected to the program or activity for action or referral, (b) if necessary, meet with school or district personnel to specify needs, (c) if necessary, contact the district-level Compliance Officer for resolution. If the school or district is unable to make the requested or needed accommodations, a written notification will be provided.

In addition to these barriers, specific to this proposal:

- The Project Director should be made aware of any request for accommodations in order to assure that they have been met in a timely way and do not constitute an on-going barrier for any individual.
- The district will work closely with local community organizations and agencies to ensure that all participants for focus groups or community meetings have full access to those opportunities and that there are no limitations due to race, color, ethnicity, religion, national origin, gender, age, citizenship status, or disability.
- Given the focus of the project, is particularly critical to ensure that barriers to full participation for members of racial and ethnic minority groups be eliminated; project staff will be vigilant when working with community members, school staff, and parent volunteers to increase the likelihood of full participation. Flyers will be posted with phone numbers and contact names in case of problems well in advance of any event.

**SUPPLEMENTAL INFORMATION  
REQUIRED FOR  
DEPARTMENT OF EDUCATION GRANTS**

**1. Project Director:**

Prefix: \* First Name: Middle Name: \* Last Name: Suffix:  
Ms. Sarah Singer

## Address:

\* Street1: 501 N. Dixon Street  
Street2:  
\* City: Portland  
County:  
\* State: OR\* Zip / Postal Code: 97227 \* Country: USA

\* Phone Number (give area code) (503)916-2000  
Fax Number (give area code)

## Email Address:

SSINGER@PPS.K12.OR.US

**2. Applicant Experience**

Novice Applicant  Yes  No  Not applicable

**3. Human Subjects Research**

Are any research activities involving human subjects planned at any time during the proposed project period?

Yes  No

Are ALL the research activities proposed designated to be exempt from the regulations?

Yes Provide Exemption(s) #:

No Provide Assurance #, if available:

**Please attach an explanation Narrative:****Attachment:**

Title :  
File :

# Project Narrative

## Abstract Narrative

### Attachment 1:

Title: Abstract Pages: 2 Uploaded File: Y:\My Documents\Grants\Student Assignment\Abstract Final.doc

## ABSTRACT

Portland Public Schools, a district of 85 schools serving 42,996 students and their families, struggles to provide equitable educational opportunities across all schools and all sections of the city. The district has experienced increased racial, ethnic and economic segregation across its system over the past eight years. This is particularly notable at the high school level. Currently at a major crossroad with a re-design of the high-school system, the district expects, within the next several years, to change high school attendance boundaries and feeder patterns and to add from three to six magnet schools. In order to decrease the trend towards segregation that is particularly acute at high schools, significant planning is required, coupled with demographically representative and transparent community engagement. The impact of the project is large and significant, with a direct impact on 3,000 high school students attending magnet schools and another 7,500 high school students with potential changes in attendance boundaries and enrollment composition.

The Technical Assistance for Student Assignment Plans in Portland project will partner with highly experienced providers to develop legally sustainable voluntary assignment plans to address key issues of racial segregation, isolation based on ethnicity, socio-economic status, and special program assignment such as Special Education and English as a Second Language (ESL). These key issues form the overarching project goal of promoting student diversity and reversing racial isolation and resegregation trends through legal, strategic, community engagement and technology-related assistance and are supported by four project objectives: 1) reconfiguring feeder patterns to enhance diversity, 2) ensuring that district magnet schools embody the diversity of the district as a whole, 3) modifying the Board student assignment plan (Absolute, Competitive Priorities), and 4) building district capacity to engage community partners and maximize external supports to sustain responsive diversity planning policies and practice.

Project activities include: 1) technical guidance on best practices to define and promote diversity and reverse trends of racial isolation and resegregation, 2) strategic, legal and technical guidance and support for re-drawing attendance boundaries and changing feeder patterns to increase integration, 3) development of student assignment strategies for magnet schools, 4) design of modified student assignment plans, with a blueprint for implementation and progress monitoring, 5) technical assistance to plan for extended community engagement with an intentional commitment to include diverse community voices in project decisions, and 6) technical assistance to modify Board policy to reflect changes to student assignment plans.

Technical assistance providers will include consultants such as (a) Maree F. Sneed of Harvard's Graduate School of Education and the National School Board Foundation, (b) successful comparable school districts and organizations that have provided technical assistance to them, (c) Portland State University's Population Research Center for demographic studies, (d) The Urban League and a consortium of community advocacy groups, and (e) Citygate GIS, Davis Demographics, and ARC GIS for specialized demographic software and training support.

Project outcomes will include: (a) modification and implementation of student assignment plans that avoid racial isolation and resegregation and facilitate diversity at three to six magnet school sites (Absolute Priority), (b) measurable evidence of decreased school segregation based on race, SES, and special program needs, (c) family/community engagement to ensure that project activities are informed by a representative set of diverse voices, (d) modification of the district Board-approved Voluntary Student Assignment Plan (Competitive Priority), and (e) increased internal capacity to maintain diverse high school enrollments by ongoing testing and calibration of demographic/special program trends.

# Project Narrative

## Project Narrative Table of Contents

### Attachment 1:

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# TASAPP: TECHNICAL ASSISTANCE FOR STUDENT ASSIGNMENT PLANS IN PORTLAND

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# Project Narrative

**Project Narrative--Please refer to Part 4 in the instructions for the list of selection criteria**

Attachment 1:

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*“Unless our children begin to learn together, there is little hope that our people will ever learn to live together.”*

*- Supreme Court Justice Thurgood Marshall*

## **Need**

### ***(1) The magnitude of need for services provided or activities to be carried out by the project.***

Portland Public Schools, the largest urban district in the Pacific Northwest, has an enrollment of 42,996 students who attend 85 schools. A legacy of unsuccessful desegregation efforts of the seventies and eighties, inconsistent and flagging support for innovative magnet schools, failing schools’ restructuring efforts, smaller school and choice initiatives, and a liberal open enrollment policy, have all contributed to skew enrollment demographics such that racial isolation and resegregation, while unintended, are the startling results. *The district’s schools are now more segregated by race, culture and class than they have ever been before.*

In 2008, the district embarked on an effort to redesign the high school system of ten comprehensive high schools where this problem is most evident. A close examination of enrollment, demographics, choice, and attendance pattern data coupled with a review of student assignment policies, provides a context for understanding the magnitude of the gaps and weaknesses that must be addressed to reverse resegregation trends.

The district is at a juncture in its high school redesign initiative; leadership and the community realize the compelling need to repair these critical challenges to reverse racial isolation and resegregation. The district needs help to craft a comprehensive plan and policies to promote diversity and reverse racial isolation trends through legal, community engagement and technology assistance for revised attendance boundaries, feeder patterns, and strategies that will lead to high school student enrollments that reflect the diversity of the district as a whole.

The magnitude of need is demonstrated by four gaps and weaknesses that are at the root

of the district's racial isolation and resegregation, particularly at the high school level.

*Gap/Weakness 1. The interaction of enrollment, demographic, choice and attendance area variables requires a new definition of "diversity."* The interaction of these variables has led to racial isolation and increased resegregation which: (a) the district finds inconsistent with its mission to educate students for a multi-cultural environment and, (b) has contributed to a significant inequality of high school educational opportunities particularly evident and critical at the high school level (i.e., no advanced placement classes at two high-minority/low-income high schools; only two International Baccalaureate programs located at low-minority/high-income high schools). An equalization of diverse student populations across all high schools using a revised definition of diversity that is not limited to race is expected to increase equitable access to opportunities. A new definition of diversity may move from race/ethnicity to a broader construct that may include socio-economic factors as well as student participation in programs such as English as a Second Language (ESL) and Special Education (SPED). (*Objectives 1, 2*)

*Magnitude of Enrollment Gaps.* Portland's enrollment declined by 10% and the district lost approximately 7,014 students during the past eight years. Projections from the *Portland Public Schools Enrollment Forecast 2006-2015* (PSU Population Research Center) indicate that an additional 2,000 high school students will be lost over the next five years. Declining enrollment has disproportionately affected six low-income high schools where enrollment has decreased by 2,724 as compared with an increase of 665 in four more affluent schools.

*Magnitude of Poverty Gaps.* Portland uses free- and reduced-price meal percentages to indicate school poverty levels. District wide, 45% of Portland's students qualify for free and reduced-price meals with percentages ranging from a low of 3% to a high of 94%. Students in poverty are more heavily concentrated in specific schools (including the six high schools where

enrollment has decreased by 2,724). Similar poverty increases *did not occur* in the four more affluent schools. The table below documents free- and reduced-meal ranges and averages for 2000 and 2008 highlighting the facts that (a) high school poverty levels have dramatically increased while both elementary and middle levels have declined over the same time span, and (b) the upper range of poverty for high schools has increased from 44% in 2000 to 75% in 2008.

Grade Span	Poverty 2000	% Range 2000	Poverty 2008	% Range 2008
Elementary	51%	4% - 94%	48%	1% - 95%
Middle	40%	7% - 73%	34%	9% - 89%
High	25%	3% - 44%	39%	7% - 75%
District	41%	41%	45%	

*Magnitude of Demographic Gaps:* The district's liberal open enrollment policy plus well-intended school choice policies have skewed demographics that have led to increased segregation, particularly evident in district high schools. While the four more affluent high schools have a higher percentage of White students than the district average (74.3% vs 55%) and lower African American enrollment (three of the four average 5.7% vs 15%), the remaining low-income high schools have up to 65.5% African-American and 15% White enrollment. This imbalance and racial isolation has increased over the years as minority populations have increased (from 37.7% to 45% in the past five years alone); the increase has been targeted to the same high schools and the same neighborhoods. Minority students account for 45% of district enrollment, primarily African American (15%), Hispanic (13.7%) and Asian (10.5%). District wide, White enrollment has declined 7.9 percentage points to 54.5% during the past eight years. The following table displays district ethnicity 2000-08.

<b>Ethnicity</b>	<b>2000 Percentages</b>	<b>2008 Percentages</b>	<b>8-year Change</b>
African American	16.6%	15%	-1.6%
Hispanic	9.2%	13.7%	+4.5%
Asian	9.5%	10.5%	+1%
White	62.4%	54.5%	-7.9%

Shifting demographics have disproportionately affected the six higher poverty high school campuses where overall enrollment has decreased but the schools have experienced dramatic increases in populations of color; again, the four more affluent high schools have not experienced similar increases of racial/ethnic minority students.

*Magnitude of special program enrollment gaps -- Special Education and ESL.*

District wide, 13.1% of the enrollment qualifies for Special Education, with percentages ranging from a low of under 4.2% in some schools to a high of 25.9% in others. (It is important to note that some Special Education programs are located in certain schools because of space issues.) Special Education students and ESL students are more heavily concentrated in the six higher poverty high schools with decreased enrollment and increased minority students. Again, similar increases did not occur in the four more affluent high schools.

*Attendance, choice and transfer:* District research indicates that in Portland, higher income and higher achieving students are fleeing poorer school attendance areas; a disproportionate number of White students are in this group. The district's choice transfers are based on space availability, transfers are determined through a centralized lottery, and space is limited. Approximately 4,000 students (about 2,800 from high school) apply for enrollment in non-neighborhood schools each year. There are more spaces available in poorer school

attendance areas where enrollment has decreased, but fewer spaces left in more affluent areas.

District Enrollment Profiles document school “capture rates” that indicate the percentage of potential enrollees that attend their neighborhood school. While capture rate averages are similar across grade spans, high school rates range from 26% to 85%. The six high schools with the lowest capture rates have decreased enrollment overall, increased poverty, and disproportional concentrations of racial/ethnic minority groups, Special Education and ESL populations.

*Gap/Weakness 2. Board policies do not directly address diversity and, minimally, do not provide a working definition that can be used throughout the district as a guide for policy and action.* Board policies and structures for student assignment have not been modified to respond to the district’s changed demographic landscape. The outdated policies are not explicit as to diversity; policies require thoughtful re-examination as new definitions of diversity expand and consideration is given to how new definitions can contribute to improved policies such as voluntary student assignment plans. *(Objective 3)*

*Gap/Weakness 3. Lack of internal capacity to identify legal, strategic, technological solutions to re-define diversity.* The district has neither the capacity nor the expertise to address these issues. *(Objective 4)*

*Gap/Weakness 4. Absence of representative set of diverse community voices in decision-making.* The magnitude of need is reflected in the disproportionate impact that minority communities have felt in earlier failed attempts to improve diversity in district schools. According to feedback from community meetings held to introduce high school redesign, there is lingering distrust among communities who have felt that changes imposed on their schools have not improved their students’ education. There is a perception that district decisions are made without soliciting and receiving sufficient feedback from the community, and that decisions are

often made over community objections that are not always fully explored. (*Objective 4*)

***(2) Extent to which specific gaps or weaknesses have been identified and will be addressed.***

District leadership from the Superintendent and staff of the new Office of Systems Planning and Performance examined, analyzed and shared information about the identified gaps and weaknesses with district and community stakeholders as part of the high school redesign initiative. The Office of Systems Planning and Performance will assume responsibility for this project which gives the district an opportunity to address the compelling needs *to repair these gaps and weaknesses* by securing high quality technical assistance from providers who have been successful catalysts for reform in comparable districts that have grappled with similar issues. The technical assistance team will build local capacity to develop a comprehensive student assignment plan to reverse racial isolation and resegregation trends in Portland.

*Gap/Weakness 1 (interaction of enrollment/demographic variables has led to racial isolation) will be addressed by redefining diversity, and using the new definition to reconfigure attendance boundaries and feeder patterns* so that racial isolation and resegregation trends are reversed. This gap will be addressed by technical assistance to develop a student assignment plan focused on responses to, but not limited by, these questions: 1) what legal restrictions must be considered when re-defining diversity? What unit of measurement should PPS use to define diversity? To what extent is Portland allowed to use racial categories? 2) What are the legal parameters for reconfiguring boundary lines? 3) How can the district ensure that magnet school population is representative of the district's population? 4) What are best practice strategies for assignment plan to magnets and how should the magnet admissions process be structured?

*Gap/Weakness 2 (Board policies for student assignment plan) will be addressed by legal guidance* to modify specific Board policies and procedures for student assignment plans,

enrollment and assignment to magnets with clearer explanations of the district's commitment to diversity, along with extended definitions of diversity that will result from project work. All of the issues addressed in repairing *Gap/Weakness 1* will be reflected in modified Board policy.

*Gap/Weakness 3 (lack of internal capacity to identify strategies for enrollment diversity)* will be addressed by careful coordination of all elements of technical assistance, legal, strategic, community engagement and technology. The Office of Systems Planning and Performance will be accountable for project coordination and outcomes to ensure that the district is able to use the latest geographic information software (GIS) to inform decision-making for this project, and develop capacity to maximize the use of new technology resources to sustain the project and ensure enrollment diversity over time.

*Gap/Weakness 4 (lack of capacity to reach and engage neighborhood and minority communities)* will be addressed by technical assistance from a community-led consortium of neighborhood advocacy and civil rights groups such as the Urban League, newly-established Parents Union, the Asian Pacific Network of Oregon (APANO), and Portland Indian Leaders Roundtable (PILR). Technical assistance will be focused, but not limited by, this question: how can project participants representative of the diverse district community be supported to contribute strategic and tactical guidance to all major decisions such that they are informed by a representative set of voices that reasonably represent the district's diverse community?

*This project is complex and challenging because its effects will, over time, accrue to all regions of the district.* While the project will likely impact, in the near term, approximately 3,000 magnet high school students, the district student assignment plan must include components to facilitate the longer-term impact on the district of almost 43,000 students as a whole. Transitioning from current assignment patterns so that high school magnet enrollments are not

only diverse and representative will be matched with community requirements for attractive and sustainable schools, long-term district commitment, and least disruptive transition procedures.

The nature and magnitude of gaps and weaknesses calls for a comprehensive approach that will respond to both Absolute and Competitive Priorities by obtaining partners that will assist Portland Public Schools to accomplish the goal of promoting student diversity and reversing racial isolation and resegregation trends through legal, strategic, community engagement and technology-related assistance in response to four project objectives: 1) reconfiguring feeder patterns to enhance diversity, 2) ensuring that district magnet schools embody the diversity of the district as a whole, 3) modifying the Board student assignment plan (Competitive Priority), and 4) building district capacity to engage community partners and maximize external supports to sustain responsive diversity planning policies and practice.

### **Significance**

#### ***(1) The likelihood that the project will result in system change or improvement***

The project will result in system change and improvement utilizing targeted and coordinated technical assistance focused on bridging four systemic gaps/weaknesses leading to successful completion of each of the four objectives stated above.

These changes will herald significant improvements for the district as both the technical assistance and the project outcomes will be comprehensive and highly-focused, rather than incremental and fragmented, characteristics that describe previous attempts to confront the complex issues of racial isolation and resegregation. For the long-term, the new capacities and competencies will enable the district to regularly conduct demographic and diversity analyses to guide ongoing planning, and alter community engagement dynamics as well as help establish a prototype that leads to proportional community participation that reflects district diversity.

Anticipated specific and significant system changes will include:

- New district definition of diversity. The district has limited its analysis to race but deeper investigation indicates other allowable and pertinent variables such as socioeconomic status, and special program enrollment (Special Education, ESL), should be considered to craft a new and legally sustainable definition to inform policies and practices that will lead to more diverse and representative school enrollment.
- Reconfigured attendance boundaries and feeder patterns that reflect diversity, improve magnet school assignment, and reduce racial isolation and resegregation.
- Impact on 3,000 high school students attending magnet schools plus another 7,500 high school students with potential changes in attendance boundaries and enrollment composition that will contribute to expanded equitable educational opportunities for all.
- Modified Board-approved student assignment plan and policies that reflect changes in the district's definition of diversity, reconfigured boundaries and feeder patterns and magnet school assignment structures.
- Expanded participation of diverse community groups to guide project decisions.

Other factors that reinforce the likelihood of significant system change are: a) Portland Public Schools continues to enjoy strong local support as 81% of community families still enroll their children in the district, b) in 2008 the district established the new Office of Systems Planning and Performance that will be accountable for project implementation, and c) project work will be supported by a TASAPP Advisory Team that will include representatives of target populations, e.g., students, teachers, district, community.

***(2) The extent to which the project is likely to build local capacity to provide, improve, or expand services that address the needs of the target population -- students, teachers, and others who will be affected by the plan.***

The project will address needs of the target population (students, teachers, the district, and the community) and provide the following benefits to key groups that will be affected by the project plan:

*Student Benefits:* A new definition of diversity will inform the district's high school system redesign and lead to: (a) high school campuses that reflect district-wide student diversity enrollment, (b) increased educational opportunities, especially at currently low-income and high-minority high schools, and (c) improved school environment and preparation for increasingly multi-cultural college campus and work places.

*Teacher Benefits:* Teachers will be represented on the project's Advisory Team and involved in the development of student assignment plans. They will benefit directly through: (a) school enrollments with diversity that reflects the district averages, (b) equity of program and teaching opportunities across high schools, (c) increased involvement of community partners for site-based decisions and (d) project support for professional development in cultural competency.

*District Benefits:* A new definition of diversity will reflect the district as a whole, and reduced racial isolation and segregation will be coupled with increased equitable educational opportunity. Modified Board policies will reflect new diversity definition in the district-wide student assignment plan and support the district's Board-approved Strategic Plan.

*Community Benefits:* Throughout and beyond the grant, district capacity will be increased to form sustained community relationships and partnerships that bring critical voices to district decision making. Through focused technical assistance, the Project Director, Advisory Team, and key staff will be prepared to work effectively with community members and organizations on issues fundamental to students and families, including the reconfiguration of boundary/feeder assignment patterns. The project's technical assistance for community engagement has the

potential to become a model for future enhanced/authentic community involvement activities.

**Quality of Project Design**

*(1) Extent to which goals, objectives and outcomes are clearly specified and measurable.*

TASAPP will contract and partner with five groups of highly experienced technical assistance providers: a) consultants who have successfully developed voluntary school assignment plans that are legally sustainable, b) successful comparable school districts and organizations that have provided technical assistance to them, c) experts in technology applications for district boundary and feeder pattern planning tasks, d) higher education academic community for assistance in demographic analysis and enrollment projections, and e) a consortium of neighborhood and civil rights community groups that are representative of Portland's diverse population and have expertise to promote authentic community engagement.

The technical assistance partners will provide legal, strategic, community engagement and technology assistance to reconfigure feeder patterns and boundaries, enhance diversity, ensure magnet enrollment diversity, modify the Board's student assignment plan, and ensure inclusive participation of the district's diverse neighborhood communities in these critical decisions. The project's carefully aligned technical assistance activities will concurrently address needs, gaps, and weaknesses to meet the overall goal of promoting student diversity and reversing racial isolation and resegregation trends in Portland Public Schools.

The following table displays a clearly-specified project goal, four specific project objectives, and *measurable* outcomes.

<b>Goal:</b> To promote student diversity and reverse trends of racial isolation/resegregation in Portland Public Schools.	
<b>OBJECTIVES</b>	<b>MEASURABLE OUTCOMES</b>

1. Reconfigure attendance boundaries/feeder patterns according to new diversity definition.	By May 2011, revised feeder patterns and boundaries will result in a 10% reduction of racial isolation and 10% increase of diversity from participant school 2009 baseline enrollment data.
2. Ensure that high school magnet student assignment plan embodies diversity of district as a whole.	By May 2011, the District will have a completed and tested student assignment plan for magnet schools that both reduces racial isolation and increases diversity by 25% over 2008 baseline data.
3. Student assignment plan modified to reflect new diversity definition.	By June 2011, Portland Public Schools' Board will approve the district-wide student assignment plan.
4. Build district capacity to engage community partners and maximize external supports to sustain responsive diversity planning policies and practice.	By June 2011, the Office of Systems Planning and Performance will have completed year-one activities in a 3-year management plan to incorporate a) acquired technology and strategic expertise and b) community engagement skills from providers to sustain the project and ensure enrollment diversity over time.

***(2) Extent to which project will build capacity and yield results that will extend beyond the period of federal financial assistance.***

Building capacity and gaining knowledge, skills and expertise to regularly calibrate the district's enrollment, and increase representative community participation in the process, is a key objective of the project. Development of a three-year management plan to incorporate acquired technological skills and communication strategies will sustain the project over time and ensure

long-term commitment to enrollment diversity and equality of educational opportunity. The plan will be evaluated as to quality and implementation progress during each grant year and beyond.

Building on technical assistance provided by Portland State University's Population Research Center, the district will schedule continuous reviews of demographics shifts within the district boundaries beyond the period of federal support. The district's heightened capacity to use project-supported GIS software for demographic planning tasks will enable staff to not only monitor, but also responsibly calibrate attendance boundary/feeder patterns over time. The technical assistance provided will build the district's capacity to monitor and mount policy and infrastructure changes in a timely and comprehensive fashion for the long term.

Expert technical assistance providers will guide the project and its leadership for two years and impact district capacity. Specific areas that will extend beyond that grant include: a) expanded, enhanced, and improved relationships within the community, specifically with minority populations, b) legal assistance to ensure that all policies and procedures are sustainable and consistent, c) use of cutting-edge technologies and cross-training of staff, and d) open and transparent processes for high school redesign and student assignment plan development. While the project will yield results in response to specific goals and objectives during the two-year grant period, long-term results will be established district competencies to re-address gaps and weaknesses as they arise in future years. The project is designed for the long-term, well beyond the two years of federal support; district capacity is the key to that design.

### **Quality of Project Services**

Equal access to technical assistance activities for eligible project participants is assured as part of the district's commitment to a diverse work force that both reflects the community and provides models of excellence for students. The district has recently hired a Workforce

Diversity and Development Director who is in the process of identifying ways to incorporate cultural competency into written policy protocols. Project staff will consult with the Director to ensure that outreach to eligible project participants is appropriate and effective. Strategies to ensure equal access and treatment for eligible project participants in traditionally underrepresented groups will include: a) intentional and deliberate considerations of diversity factors when developing the Advisory Team and teams of parents, teachers, and principals as focus group members, b) regular analysis of levels of participation of population subgroups to lead recruitment efforts in formulating teams and receiving critical feedback, and c) evaluations on key sessions with, and facilitated by, technical assistance providers.

***(1) The extent to which served entities demonstrate support for the project.***

The best evidence of demonstrated support for this project is contained in an April 29, 2009 report of opinion research findings commissioned by the district as part of its high school redesign initiative. The goal of the research was to collect and analyze student, teacher, parent, district, and community perceptions about the needs for high school redesign, and possible next steps. Four hundred randomly-selected district residents participated in telephone surveys, 1,322 district staff and 2,352 students from grades 8-12 participated in an online survey and an additional 39 students (including both enrolled and dropped-out students) participated in six small focus group discussions. Five hundred community members attended four large community groups as part of the district conversation about improving high schools.

Two key research findings demonstrate support for, and have informed, this proposal:

a) *Equity*. Portlanders care about equity and want services and resources to be equitably distributed. Closing the achievement gap between different socio-economic and ethnic groups is a high priority among all respondents. Responses were mixed, however, on giving minority and

poor students preferences for school transfer. b) *Communities want to be genuinely engaged* with real input and the opportunity to bring new ideas to the conversation rather than merely responding to solutions that the district presents. These findings suggest a commitment to equal access for all student groups but the findings also convey complexities of community concerns regarding student assignment and transfer practices.

Additional demonstrations of support for the project include: a) a Board request to provide assistance for modifying outdated policies regarding enrollment, b) a request from the district's Enrollment and Transfer Center to assist with legally-sustainable policies for high school assignments, and c) community and district concern for the trend towards increased segregation and the lack of equity of program and course opportunities at the high school level.

***(2) The services reflect up-to-date knowledge from research and effective practices.***

Areas of technical assistance services and potential providers were determined after the Office of Systems Planning and Performance conducted an initial literature review of recent research on best practices for student assignment plans. Information and knowledge to inform this project application was gleaned from a review of a) relevant Supreme Court cases (*Parents Involved in Community Schools v. Seattle School District #1*, No. 05.0908 and *Meredith v. Jefferson County Board of Education*, No. 05-0915), b) websites from school districts who have successfully designed plans that emphasize multi-factor student assignment approaches, (e.g., *Jefferson County School District* in Kentucky, *Wake County School District* in North Carolina, and *San Francisco Unified School District*), and c) educational policy literature and research.

Reported best district practices were considered in terms of a careful examination of reports of those district's early implementation results, e.g., the NAACP Legal Defense and Educational Fund's *Factsheet on Impact of Race-Neutral Alternatives*, Richard D. Kahlenberg's

presentation *Passing the Torch: The Past, Present and Future of Inter-district School Desegregation* at the January 27, 2009 Charles Hamilton Houston Institute at Harvard Law School. The review focused on legal, strategic, and technology-related topics with careful attention to how diverse and representative communities were successfully engaged in the various districts' decision-making processes.

Portland Public Schools is confident that its proposal to deal with the complex goal of promoting student diversity and reversing racial isolation and resegregation trends through legal, strategic, community engagement and technology-related assistance is based on the most current and up-to-date knowledge.

**(3) *Impact of technical assistance services on intended recipients of those services.***

The immediate impact of technical assistance services on staff, Board, and community will be their contribution to decision-making for a new definition of diversity for Portland Public Schools. A slightly longer-term outcome will be new policies and a student assignment plan to ensure that student enrollment is reasonably representative of the district's diversity.

The likely long-term impact of the services for *recipients* is expected to include: a) for parents and community, a better understanding of the power of responsible participatory decision-making in public education with potential for more involvement in schools, b) for district and board, heightened awareness of legal and strategic challenges the district faces in its quest to support diversity in public policy and practices, and c) for all recipients, increased capacity, skills, and both internal and external resources to effectively address the significant challenges of racial isolation, equity of programs, and diverse enrollment in the schools.

The impact of the project extends beyond the immediate recipients and includes, as well: a) an educational experience for *students* that recognizes and values diversity, providing a full

range of ideas and backgrounds for maximized learning, b) equity of learning and teaching opportunities at high schools, regardless of school site (*students, teachers*), c) community engagement and involvement in district-level decision making and improved communication and trust (*community leaders*), d) revised definition of diversity that will guide programs and enrollment, (*students, parents, teachers, administrators*) and e) legally sustainable, research-based, and technologically sound student assignment plans (*students, parents, schools*).

### **Quality of Project Personnel**

The project will be led by Sarah Singer as the Project Director (resume attached) who will report directly to Sara Allen, Executive Director of Systems Planning and Performance and to Zeke Smith, Chief of Staff to the Superintendent. Ms. Singer, with an MBA from Northwestern University and an MPA from the John F. Kennedy School of Government, has been the co-leader of the district's High School System Redesign Effort, working closely and effectively with community and district representatives to develop designs that reflect best practices, best research, and best thinking for the future of students. As a leader, Ms. Singer has developed a cohesive and broad-based team that has worked effectively with numerous external consultants, community groups, and schools in over fifty area presentations and focus groups during the past year alone. Her expertise in project management, community building, and cross-functional planning, along with leadership experience and knowledge of business and budgets, will serve her well as Project Director.

Working closely with Ms. Singer will be Dr. Sue Hiscox (resume attached) whose expertise on federal grants, both in development and evaluation, is extensive. With over 16 years as an educational evaluator, she has worked with the district's USDE's Striving Readers, Smaller Learning Communities, and Magnet grants leading evaluation teams for each program. She is

particularly skilled in qualitative evaluation methodology, development of data collection instruments and protocols, has extensive experience in conducting formative and summative process evaluations and completing required annual performance reports for federal grants.

For these and all positions within the district, the selection of staff demonstrates an intentional piece of systems planning to align district initiatives to research, best practices, proven efforts that will lead to equity of enrollment opportunities and reflection of the district's diversity. Portland Public Schools is committed to a diverse work force that both reflects the community and provides models of excellence for students. In a state that is 14% minority, versus the national figure of 26%, the minority student population in Portland is 45%. Some Portland neighborhoods are 100% minority, a fact reflected in the local school enrollment. Men, ethnic and racial minorities, and teachers and administrators with disabilities are less prevalent in school corridors than their more traditional colleagues, although significant strides have been made in reducing this disparity over the past several years. As positions become available throughout and beyond the grant period, however, the district will make every reasonable effort to go far beyond the minimum statement printed on Human Resources material: *Portland Public Schools recognizes the diversity and worth of all individuals and groups and their roles in society. It is the policy of the Portland Public School Board that there will be no discrimination or harassment of individuals or groups on the grounds of age, color, creed, disability, marital status, national origin, race, religion, sex or sexual orientation in any educational programs, activities or employment* in order to increase the number and percentage of teachers, administrators, and staff who live in the community, send their children to Portland Schools, and have been underrepresented in the district. Applications will be actively sought from individuals from groups that have been based on race, color, national origin, gender, age, and disability.

Efforts are expected to include, but not be limited to: a) notification of any and all job openings to project community partners, specifically those representing the minority communities, including translations upon request, and b) publication and distribution of material that outlines district employment policies and practices with an inclusive, welcoming approach.

Equally critical are the qualifications of the consultants who will assist the district in developing new student assignment plans to reduce racial isolation in meeting the identified goal and objectives. The Project Director and Executive Director of Systems Planning and Performance will work with other district offices to develop focused requests for proposals that will be distributed, in several cases, nationally. Expectations will be specified regarding relevant training and experience, requiring – for the selected candidate – *a proven track record of success* in the area of consultation and technical assistance. References and letters of recommendation, particularly school district references, will be thoroughly checked.

**Adequacy of Resources.**

The cost of the project, \$249,977 over a two-year period, is fair and reasonable for the salaries, services, materials, and other costs detailed in the budget narrative. Each cost is directly tied to a program objective and the overall design and critical to the success of the project.

The objectives focus on: (a) revised feeder patterns and boundaries that will reduce racial isolation and increase diversity across high schools, (b) student assignment plans for new magnet schools that will result in a diversity distribution that more accurately reflects the district's overall diversity, (c) completion and Board approval of a legally sustainable student assignment plan to be implemented across all schools, (d) increased district capacity to understand, modify, evaluate, and enhance the needs and requirements involved in student assignments to ensure long-term and sustained commitment to equality of opportunity and diversity in enrollment, and

increased capacity for enhanced and representative community engagement.

All costs included in the budget are directly related to these objectives (i.e. Project Director to lead the effort [15.6% of direct costs], technical assistance [58%], travel to Washington meetings [6.6%], software to assist with boundary changes [6.4%], evaluation costs and translation support [8.7%], and other directly aligned supply and support costs [4.6%]).

Each of the four objectives leads into and fully supports the project design, which centers on the district's use of technical assistance expertise from student assignment specialists, demographers, community relations specialists, planners, minority community leaders, software developers and trainers, successful school districts, and civil rights organizations. The specialists will work with key staff members, the Advisory Team, members of the community, school and district administrators and leaders, and enrollment and transfer staff, as well as with parents and the community. The final products will be student assignment plans that successfully address racial isolation and segregation, but equally important outcomes will be a cohesive community with a goal for diverse enrollments across the district and the capacity within the organization to meet the goal and objectives, and sustain the project far beyond the grant period.

The costs of the project in relation to the significance of the project are minimal. Within Portland Public Schools, enrollment trends have led to a lack of diversity and racial isolation at every level. Within the district's high schools, numerous factors have formed the perfect storm, creating educational imbalance and unequal opportunities; in many cases, the rigor has followed the students out the door. TASAPP will provide the technical expertise to develop a student assignment plan to reverse this trend and return equal opportunities to all students.

### **Quality of the Management Plan**

*(1) Adequacy of the plan to achieve the objectives on time and within budget, including clearly defined responsibilities, timelines, and milestones for accomplishing project tasks.*

The project management plan will be implemented by key staff from Systems Planning and Performance, Research and Evaluation, Enrollment and Transfer, and the Superintendent's office working with an Advisory Team that represents key program constituencies: teachers, principals, Board and community members, and district administrators. The Advisory Team will meet quarterly and work with the full-time Project Director, Sarah Singer, throughout the grant period. The Team and Ms Singer will share oversight and progress monitoring responsibilities toward achieving the project's four objectives. Twice a year, Ms Singer and the Team will meet with the project evaluator to document district responses to technical assistance recommendations for legal, strategic, engagement and technology improvements. Ms Singer will assume primary responsibility for all grant operations including: a) budget oversight and compliance, b) RFP development and consultant selection, c) GIS software selection and purchase, d) Advisory Team coordination, e) evaluation, grant reporting, analysis of project progress to timelines, and f) coordination of all technical assistance activities.

The Project Director will be responsible for implementation of the following major activities tied to the four project objectives. Timelines, milestones are identified in **BOLD** print.

*a) Objectives 1, 2. Reconfigured boundaries, magnet enrollment reflects district diversity.* Activities: i) June 2010: **develop new diversity definition**, including diversity parameters for magnets; ii) Jan-June 2010: GIS simulations for boundary/feeder pattern changes, June 2010: magnet assignment with new diversity definition; iii) July-Sept 2010: conduct legal review of redrawn boundaries, feeders, magnet student assignment plans; iv) Jan 2010: **develop implementation strategy for boundary/feeder changes** with blueprint for GIS monitoring to test diversity distributions over time.

*b) Objective 3. Modified Board Student Assignment Plan.* Activities: i) June 2011: Draft

modified student assignment plan/policies re new diversity definition and conduct legal review for sustainability; ii) **Board approval of legally-sustainable modified plan.**

c) *Objective 4. Technical assistance for diversity policies/practice and representative community engagement strategies.* Activities: i) Oct-Dec 2009: Identify, contract with providers, conduct initial meeting to **develop coordinated action plans, service timelines, schedule recommendation deliverables**; ii) Jan-June/Sept-Nov 2010: Identify participants and schedule technical assistance work groups (teachers, principals, administration, community) to address solutions to project-identified gaps/weaknesses; iii) Jan 2010: **Schedule GIS training for district staff**; iv) Jan 2010 – March 2011: Schedule representative community meetings, focus groups, facilitated meetings to share and garner feedback on emerging technical assistance recommendations.

**(2) How a diversity of perspectives will be brought to bear in project operations.**

This project has been guided by the diverse opinions of students (including high school attendees and dropouts), teachers, district leadership, and community members that participated in the first year of the high school redesign. Project operations will continue to be informed by perspectives of: a) an array of technical assistance providers with diverse skill sets, e.g., university demographers, advocacy groups that mirror the district's racial/ethnic and cultural diversity, attorneys, technology specialists from the private sector; and by b) teachers, administrators and parents from schools that have suffered dramatic demographic shifts with attendant losses of equitable educational opportunity, as well as staff and parents from schools who have never experienced such wrenching challenges. The Advisory Team will represent a broad-based set of constituents throughout the project, and community meetings and focus groups from all city areas will provide feedback each year of the grant, encouraging all voices.

## Quality of the Project Evaluation

*(1) The extent to which the methods of evaluation provide for examining the effectiveness of project implementation strategies.*

The evaluation will examine the effectiveness of project implementation strategies as defined in the project's management plan, and the progressive success towards four objectives and measurable outcomes. Evaluation of the project implementation process will be guided by key questions that are followed by a description of the evaluation methodology that will be used.

a) *To what extent are project activities conducted to meet the project timeline?* As specific milestones for receiving technical assistance, creating drafts of student assignment plans, and training internal staff on the use of software applications are finalized, the evaluator will keep a master schedule of assistance provided and activities conducted. The evaluator will meet with the Project Director three times a year to review implementation progress against timelines and to track project success. Status will be reported to the Advisory Team.

b) *To what extent do project staff use the recommendations from the technical assistance providers?* Each technical assistance provider will document the key recommendations to the district. Three times a year, the evaluator will facilitate a meeting with program staff to document district response to the recommendations: were they accepted and used, modified or rejected? The evaluator will keep a log of responses that will be shared with the Advisory Team during regularly scheduled project reporting.

c) *What is the quality of community communications?* Community conversations are an important part of the project and need to be monitored as one estimate of likely acceptance of long-term student assignment plans. An evaluation at each community meeting or neighborhood focus group will ask participants for basic demographic data, their reactions to key elements of discussion, whether the meeting adequately addressed their concerns. Evaluation surveys will be

translated into the five major district languages. Results will be summarized and distributed to the Advisory Team after each set of meetings. At least once a year, the consortium of local community engagement providers will be asked to facilitate a focus group with their membership for feedback on the overall communication process.

*d) What evidence suggests that the district has the capacity to sustain ongoing planning and implementation once the project ends? A major competency needed by the district is the use of GIS software combined with district identified parameters for diversity. Technical assistance will provide training and support during the first year of the program. The evaluation includes development of a skills checklist for district staff, with periodic ratings by technical assistance providers. During the second year, the district staff will be asked to conduct simulations for the evaluation—with monitoring by technical assistance providers who will report levels of staff proficiency in using the new software.*

***(2) The extent to which the methods of evaluation will provide performance feedback and permit periodic assessment of progress toward achieving intended outcomes.***

Questions about progressive success towards four identified project objectives will provide progress monitoring feedback to inform implementation improvements. Key questions are followed by a description of the evaluation methods that will be used.

*a) Are plans to reconfigure attendance boundaries and feeder patterns on track to meet the project objectives and do they appear legally defensible? Are the district magnet enrollment plans on track to meet project objectives and do they appear legally defensible? Twice during the project, two technical assistance providers with expertise on legality of school boundary creation will review the boundary plans and the magnet program plans for legality. For the evaluation, a written report with specific issues will be required. In addition, as plans are initiated, simulations will be run to look at likely impact. During the first year, technical*

assistance providers will run or help district staff to run the simulations using demographic parameters defined as part of the project. Deviance from goals will be documented as part of the simulation and reported to the program staff as feedback. Progress reports to the Advisory Committee will include issues found by the simulations.

*b) To what extent does community participation represent and reflect district diversity?*

*To what extent are community participants representative of district diversity supportive of plans as they evolve?* The evaluation methods used to assess the quality of community communications - described above in Section (1)(c) - will similarly be used to respond to these evaluation questions.

*c) Is the district moving along development of a three-year plan designed to sustain the project over time?* Measurable outcome: By June 2011, the Office of Systems Planning and Performance will have completed year-one activities in a three-year plan to incorporate i) acquired technology and strategic expertise and ii) community engagement skills from technical assistance providers to sustain the project and ensure enrollment diversity over time. (Objective 4)

A final evaluation will document completion of the district's school-board approved student assignment plan and report whether the plan is being implemented or remains in an implementation planning phase but is prepared to be implemented (performance measure). The final evaluation will also document measurable outcomes for each objective.

# **Project Narrative**

**Other forms- appendices**

# Project Narrative

## Other forms--resumes

### Attachment 1:

Title: **Resumes** Pages: **6** Uploaded File: **Y:\My Documents\Grants\Student Assignment\Appendices\Key Resumes.doc**

# PROJECT DIRECTOR

## SARAH SINGER

### EDUCATION

- 2003-2006      **JOHN F KENNEDY SCHOOL OF GOVERNMENT**      Cambridge, MA
- Master of Public Administration, June 2006
- KELLOGG SCHOOL OF MANAGEMENT**      Evanston, IL
- NORTHWESTERN UNIVERSITY**
- Master of Business Administration, June 2006
- 1995-1999      **BUCKNELL UNIVERSITY**      Lewisburg, PA
- Bachelors of Arts in economics and sociology, May 1999      Oxford, UK
  - Studied at Oxford University junior year

### WORK EXPERIENCE

- 2007 to present      **PORTLAND PUBLIC SCHOOLS**      Portland, OR
- Broad Resident*
- Participant of the Broad Residency in Urban Education, a national and highly selective (5% admissions rate) two-year management development program that recruits and trains emerging leaders for senior management positions in public education.
- Co-lead of High School System Redesign Effort, 2008 to present*
- Leading an effort to redesign the high school system in order to increase graduation rates and ensure greater equity in achievement outcomes; effort will include changes to the number of schools, locations and types of programs and enrollment parameters and policies; the effort will feed into a multi-million dollar district-wide capital improvement plan
  - Managing a cross-functional work team that includes the Chief Operating Officer, the head of Communications and the Assistant Superintendent of High Schools to coordinate high school reform efforts with the capital improvement plan
  - Facilitated more than 20 work sessions with principals, teachers and internal staff; in total, more than 350 internal staff have been engaged in the process
  - Oversaw the distribution of a community-wide and staff survey about high school reform
  - Completed a current state assessment of the high school system, including detailed analysis of student achievement outcomes and enrollment trends and patterns
- Director of Special Projects, 2007-2008*
- Led a strategic planning effort around career technical education programs for PPS; convened a group of business partners, educators, and post-secondary leaders in creation of the plan
  - Refined the staffing formula for high schools; conducted an analysis of the semi-fixed staffing costs of high schools, which informed the new staffing formula
  - Co-led an effort to roll out project management frameworks across the central office
  - Created a website for the Office of High Schools

1999-2003, 2006-2007

**DELOITTE CONSULTING**

Seattle, WA; Chicago, IL

*Senior Consultant, Strategy and Operations, September 2006 to September 2007*

- Conducted a strategic assessment for a \$1.3 billion Community Foundation

*Consultant, Project Management and Operations, 2001-2003*

- Led dry-run testing for an 8 million member health care company to ensure that doctors received correct medical content within the first release of a computerized medical system; the release was later successfully implemented and used as the basis for releases in other regions

*Business Analyst, Operations, Strategy and Change Leadership, 1999-2001*

- Re-designed human resource processes of a large medical supplier company, resulting in better alignment with newly implemented ERP system and greater overall efficiencies including proposed 30% reduction in time to process new hires and 25% reduction in errors related to benefits delivery

Summer 2005

**CHICAGO PUBLIC EDUCATION FUND**

Chicago, IL

*Summer Fellow, Marketing and Strategy*

- Led brainstorming sessions with Chicago Public School (CPS) personnel to develop a strategic plan for increasing the numbers of National Board Certified teachers at CPS
- Conducted a market analysis resulting in ten recommendations that if implemented will increase by three times the number of Nationally Board Certified teachers at CPS

Summer 2004

**CHICAGO PUBLIC SCHOOLS**

Chicago, IL

*MBA Intern/Summer Fellow, Operations and Strategy*

- Led a study to determine more efficient process flows and an improved organizational design for the Chicago Public School system; conducted 135 interviews across the organization
- Created an implementation plan for recommendations; first set of recommendations to be implemented prior to the start of 2004 school year; recommendations expected to result in a more than \$1 million in savings

**OTHER DATA**

- **Reaching Out MBA Conference**, Co-lead, November 2005, Board Member 2006: organized a 550 person conference for lesbian, gay, bi-sexual, and transgender (LGBT) MBAs; team raised in excess of \$400,000 in 5 months
- **Boston Public Schools, Coach Program, 2005-2006** led college planning tutorial sessions
- **Chief Sealth High School**, volunteer teacher, Summer 2003: taught a 9<sup>th</sup> grade international economics class

# Senior Evaluator

## **Suzanne Hiscox, Ph.D**

*Research, Evaluation and Assessment Department  
501 North Dixon Street  
Portland, OR 97227*

*Portland Public Schools  
(503) 916-2000*

### **AREAS OF EXPERTISE**

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Program evaluation design  
Federal grant evaluation design; grant evaluation  
Program evaluation implementation and reporting  
Assessment and testing  
Consultation on interpretation and use of data  
Oregon Data Training, Strand 2 certification  
Training implementation

### **FEDERAL GRANT EXPERTISE**

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US Department of Education: Striving Readers, Portland Public Schools  
US Department of Education: Smaller Learning Communities, Portland Public Schools  
US Department of Education: Magnet Assistance Programs, Portland Public Schools

### **EMPLOYMENT**

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**Senior Evaluation Specialist** 2002-present  
*Research, Evaluation and Assessment Department  
Portland Public Schools*  
Consults with principals, site councils, counselors and school staff on the use of data for school improvement planning. Manages evaluations for several internal or federally funded programs each year, including federal grants. Designs and implements internal evaluations for one or two projects each year. Internal evaluator and co-coordinator for the NSIF grants using Data Wise.

**Training Manager** 1984-2002  
*Intel Corporation*  
Responsible for the development, evaluation and delivery of training across multiple U.S.-based and international sites. Training ranged from interpersonal and management skills to technical training for engineers and technicians.

**Evaluation Specialist** 1974-1984  
*Northwest Regional Educational Laboratory*  
Responsible for technical assistance consulting as part of the first Title I Technical Assistance Centers. The centers provided support for Title I schools in three U.S. regions as they implemented consistent evaluation procedures. Developed and taught workshops on evaluation planning, increasing time on task, and selecting appropriate standardized tests.

### **EDUCATION**

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B.A. German Education	Purdue
M.S. Educational Psychology, (ed. research focus)	Purdue
Ph.D. Educational Psychology (evaluation focus)	Brigham Young

# Shawn Helm

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## EDUCATION

**Portland State University, GPA: 4.00** Summer 2004 - Spring 2005  
Course Highlights: Analytic Methods for Public Administrators I and II, Calculus III, GIS I

**University of Colorado at Boulder** May 2003  
B.A. in Economics, Major GPA: 3.75, GPA: 3.35

## HIGHLIGHTS OF QUALIFICATIONS

- **Scenario Model Developer**
  - For High School Redesign, developed stand-alone excel tool where then a project manager can re-assign elementary neighborhoods to a different high school – which is what happens when a boundary is moved – and see the resulting changes in neighborhood school sizes and poverty percentages of the new areas. Separately, linked this with ArcGIS so that scenarios are mapped.
  - For K-8 implementation, developed a Section Analysis tool at a district and school level that allowed both groups of decision makers to see the trade offs of allocations, grade blends, class size, and other staffing needs like electives and school based staff. Provided means to approximate the ability of schools to meet additional centrally directed program requirements and informed decision-makers to some degree on whether a given FTE cut scenario may cause dysfunction.
  - For budgeting for the current recession, developed tool for Senior Leadership and Board to help with salary negotiations where they could calculate the dollar savings associated with many salary-related levers (cost of living freezes, across the board salary reductions, progressive salary reductions above a given minimum level, or cutting school or non school days) for the district overall as well as by each employee group and funding group and employee income range.
  - Responsible for the scenario modeling and allocation of General Fund School FTE. This is an iterative process involving the calculation and re-calculation of the student-based staffing formulas with current student data and projected changes as well as formula methodology changes, comparing model results, summarizing costs, impacts and opportunity costs of the alternative mythologies in various scenarios. Coordinate publishing of results with the Budget Office. Compare enrollment with student numbers for staffing for further FTE allocations.
- **Data Analysis and Presentation**
  - Convert and combine student, employee and financial data into useable summaries that decision-making and transparency to increase community engagement around of resources and results. This includes annual statistical profiles for all elementary,

- middle, and high schools by including enrollment tables and maps by race/ethnicity, gender, neighborhood, poverty, areas living and enrolled.
- Used GIS to geo-code October enrollment and map student demographics (Race/Ethnicity, Poverty) by those attending area schools to those living in that area. Applied advanced spatial analysis techniques to convert points into raster data using majority group analysis for displaying multiple discrete groups without overlap when mapping Race/Ethnicity or point density when mapping either overall enrollment or percentages of that enrollment by location such as attendance to neighborhood of students by residence. See map pages in link above starting on page 117.
  - **State and Federal Reporting Compliance**
    - Audit and reconcile to 'clean' data for accuracy; building files from multiple data sources; interpreting state and federal rules and regulations; coordinating and working with other departments and school staff; submitting data electronically to the state; analyzing and summarizing data; publishing final results on the district website; explaining uses and limitations of data. Collections include Average Daily Membership (ADM), October Enrollment, HQ Teachers, High School Completers and Leavers, Discipline.
  - **Information Technology**
    - Software experience includes MS Excel (advanced), MS Access, ArcGIS, SPSS, Oracle PeopleSoft HRMS, PeopleSoft Financials, eSIS, PPS Budget Build, MS Word, MS PowerPoint, FileMaker Pro, Outlook, FrontPage, Acrobat, Open Office, Photoshop, PageMaker, Energy10, DreamWeaver, Quicken, E-Views.
    - Programming experience includes SQL, Oracle Analytic functions, Visual Basic for Excel, little Java, HTML

## EXPERIENCE

### PORTLAND PUBLIC SCHOOL DISTRICT

Portland, Oregon 2005 to present

***Data Manger (Summer 2009 – Present)***

***Senior MIS Analyst (Summer 2008 – Summer 2009)***

***Management Information Specialist (MIS) (Winter 2005 – Summer 2008)***

***Budget Analyst ( Spring 2004 – Fall 2005 )***

Roles within Portland Public Schools began in the Budget department and then in 2008 I joined the Data and Policy Analysis Department. Responsibilities begin with the generating the allocations of General Fund School FTE, as well as FTE scenario modeling and revenue forecasting. Starting in 2005 role shifted from budgeting to State and Federal Reporting. More recently, responsibilities have grown to include Data Analysis and Presentation for decision-making and transparency. See Highlights of Qualifications above for more information.

### YOUNG SCHOOL OF POLICY STUDIES, GEORGIA STATE UNIVERSITY

Atlanta, Georgia Summer 2003

**Research Intern** for Dr. Jorge Martinez-Vazquez and Dr. Jamie Boex

Explained Tanzanian education funding through analyzing financial and demographic statistics to promote funding transparency.

Created and tested a formula to be used in intergovernmental transfers from the central government of Tanzania to local districts, which is more equitable and efficient than the current system.

Presented results both in a written policy note that was submitted to the Tanzanian education ministry with PowerPoint to fellow interns.

## ***CENTER FOR SCIENCE AND TECHNOLOGY POLICY RESEARCH***

***University of Colorado at Boulder***

*Spring 2002 – Spring 2003*

**Research Assistant III** for Dr. Roger Pielke Jr.

Surveyed scientific, government, and business literature available on carbon cycle science and carbon sequestration to outline the capabilities, needs, and limits of end users of carbon cycle research and web-published the results.

Through utilizing Excel, analyzed economic forecasters reporting in Business Week on how they foresaw the following year's economic growth to determine how forecasters performed based their accuracy and skill compared to series of naïve baselines offering alternative forecasts

**Research Assistant III** for Dr. Robert Frodeman

Web-researched, graphed and web-published a series of Humanities Indicators:

# Project Narrative

## Other forms--letters of support

### Attachment 1:

Title: Letters of Support Pages: 3 Uploaded File: Y:\My Documents\Grants\Student Assignment\Appendices\Letters of Support.pdf



## PORTLAND PUBLIC SCHOOLS

501 North Dixon Street / Portland, Oregon 97227  
Mailing Address: P.O. Box 3107 / Portland, Oregon 97208-3107  
Telephone: (503) 916-3741 • FAX: (503) 916-2724  
E-mail: [schoolboard@pps.k12.or.us](mailto:schoolboard@pps.k12.or.us)  
**BOARD OF EDUCATION**

Ruth Adkins  
Martin Gonzalez  
Pam Knowles  
Bobbie Regau  
Trudy Sargent  
Dilafuz Williams  
David Wynde

Henry Johnson  
Student Representative

August 19, 2009

Fran Walter  
United States Department of Education  
Office of Elementary and Secondary Education  
School Support and Technology Programs  
400 Maryland Avenue, S.W.  
Room 3W113  
Washington, D.C., 20202-6400

Ms. Walter:

As co-chairs of Portland Public Schools (PPS) Board of Education, we fully support our district's pursuit for the Technical Assistance for Student Assignment Plans (TASAP) program grant.

PPS is in the midst of a high school system redesign process that in part is created to facilitate greater student diversity at each of our high schools. The outcomes of this process will necessitate the district to modify and update its voluntary school assignment policies. Thus, there is a strong need to develop legally sustainable student assignment plans in accordance with the parameters of the recent Supreme Court decisions that will also facilitate greater student diversity.

We also recognize the need to ensure that all voices are heard throughout this process. We are excited, that as part of this grant application, there is a concerted effort to reach out to traditionally underrepresented communities.

Given this, we fully support PPS' application for the TASAP program grant.

Sincerely,

(b)(6)

Trudy Sargent  
Co-Chair

Ruth Adkins  
Co-Chair

College of Urban and Public Affairs  
Toulan School of Urban Studies and Planning  
Institute of Portland Metropolitan Studies

Post Office Box 751  
Portland, Oregon 97207-0751

503-725-5170 tel  
503-725-5199 fax  
ims@pdx.edu  
www.pdx.edu/ims



August 18, 2009

Fran Walter  
United States Department of Education  
Office of Elementary and Secondary Education  
School Support and Technology Programs  
Washington DC

Dear Ms. Walter,

Portland State University's Population Research Center and the Institute of Portland Metropolitan Studies is pleased to support Portland Public Schools (PPS) pursuit for the Technical Assistance for Student Assignment Plans (TASAP) program grant.

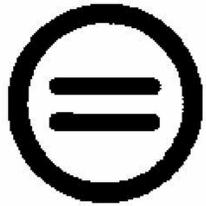
For the past several years, Portland State University has partnered with PPS on various enrollment forecast studies. In doing this research, we recognize that PPS has experienced increased socio-economic, ethnic and racial segregation. As such, we support their efforts to develop legally sustainable voluntary assignment plans that will facilitate greater student diversity.

We look forward to working with PPS to provide additional guidance and assistance as they embark on the process to develop a more equitable school system. We enthusiastically support this application.

Sincerely,

(b)(6)

Sheila Martin  
Director and Associate Professor  
Institute of Portland Metropolitan Studies  
Population Research Center  
Portland State University



Urban League  
of Portland

August 19, 2009

Fran Walter  
Technical Assistance for Student Assignment Plans Program  
U.S. Department of Education  
400 Maryland Avenue, SW, Room 3W113  
Washington D.C. 20202-6400

Dear Ms. Walter,

Please accept this letter in support of the Portland Oregon School District's grant application for *Technical Assistance for Student Assignment Plans in Portland*. We at the Urban League have served advocacy and support roles for the district for many years. In our partnership with PPS, we have sought to serve as a community catalyst for school improvement.

This grant application is particularly encouraging in that it calls for a consortium of community advocacy and civil rights groups to assist the district in its mission to increase diversity in all of its schools, and to decrease racial isolation and resegregation that has plagued us for far too long.

We at the Urban League will be proud to either lead, or be active members of, the proposed community engagement consortium, and we look forward to joining Portland Public Schools in this critical work.

Please give this application your highest consideration, and do not hesitate to contact us for additional supportive information that you may need.

Sincerely,

(b)(6)

Marcus C. Mundy  
President and CEO  
Urban League of Portland

# Project Narrative

## Other forms--Indirect Cost Rate Agreements

### Attachment 1:

Title: **Indirect Cost Rate** Pages: 1 Uploaded File: Y:\My Documents\Grants\2008-2009 Indirect Cost Rate.doc



## PORTLAND PUBLIC SCHOOLS

Getting Results • Sustaining Hope

501 North Dixon Street / Portland, OR 97227

Mailing Address: P.O. Box 3107 / 97208-3107

Telephone: 503-916-2000

# 2008-2009 INDIRECT COST RATE

Portland Public Schools has received approval from the Oregon Department of Education for the restricted **indirect cost rate for 2008-2009 fiscal year. The rate will be 6.50%**. The rate represents an increase from last year's 6.13% rate.

Below is the email documentation from ODE

---

Sharie Lewis, CPA  
Assistant Controller  
Portland Public Schools  
(503) 916-3153  
Fax (503) 916-2123

>>> "priest suzette" <Suzette.Priest@state.or.us> 8/31/2008 8:39 AM >>>

Dear LEA Business Manager,

Below you will find detail on the disposition of any adjustments you requested as well as the calculation of your final restricted indirect rate for the 2007-2008 fiscal year.

**2008-2009 Restricted Indirect Rate for Portland Public Schools (School District 1J, Multnomah County) is:**

**Indirect/(Unallowed + Direct) = Rate**

**\$25,957,029/(\$7,970,106 + \$391,086,731) = 6.50%**

## TECHNICAL ASSISTANCE FOR STUDENT ASSIGNMENT PLANS IN PORTLAND

### BUDGET NARRATIVE

The budget for the *Technical Assistance for Student Assignment Plans in Portland* project is sound, fiscally responsible, and directly aligned to the project priorities and activities as described in the proposal. All expenditures *supplement*, and do not *supplant*, district fiscal efforts. The budget includes the following expenditures throughout the two-year program award:

	Year 1	Year 2	TOTAL
<b>PERSONNEL</b>	20,000	23,500	43,500
<b>Project Director.</b> While the Project Director will be full-time on the project, the federal budget will include 15% of her salary. Her responsibilities will cover the supervision of the project, compliance with the budget, development and facilitation of Advisory Team, identification of appropriate technical assistance, and operations of the project to meet program goal and objectives.	13,500	13,500	27,000
<b>Translation Services.</b> The budget includes 100 hours each grant year of translation serves at \$25 per hour to translate written materials (hard copy and material for the website) and provide oral translations for community meetings to meet specific objectives outlined within the proposal.	2,500	2,500	5,000
<b>Evaluation Services.</b> Funds are provided for professional evaluation within the district's Office of Research and Assessment at a cost of \$11,500 for the project evaluation (approximately 5% of direct costs). The cost includes assistance with the final reporting on the grant.	4,000	7,500	11,500
<b>FRINGE BENEFITS</b>	6,373	7,217	13,590
<b>Benefits/fringe costs</b> are calculated at 24.10% of all salary costs and FICA, Workers' Compensation, Unemployment Compensation, Other Employer Paid Benefits, and Employer-covered retirement costs	4,820	5,664	10,484
<b>Health and wellness benefits</b> are for the Project Director provided at a pro-rated cost based on an annual cost of \$10,355 for a full-time employee.	1,553	1,553	3,106

School District 1J Multnomah County  
Portland Public Schools

Budget Narrative

<b>TRAVEL</b>	6,450	9,030	15,480
New grantee meeting. Funds are included for the Project Director and additional participants to attend the required meeting in Washington DC each year of the grant. In year one, four staff will join the Project Director (two schools represented) and in year two, six staff will join the Director (one additional Magnet school will be in place). Costs will include round trip airline (\$550), three night hotel (\$200 per night for three nights), per diem (\$30 per day for three days), ground transportation/parking (\$50). The cost is \$1,290 per person per trip.	6,450	9,030	15,480
<b>EQUIPMENT</b>	0	0	0
<b>SUPPLIES</b>	18,500	3,400	21,900
<b>Meeting Supplies.</b> The budget includes the cost of meeting supplies for (a) Technical Assistance providers and key staff, (b) Advisory Team regular meetings throughout the grant, (c) Technical Assistance providers with other participant populations including community, students, and teachers, and (d) focus group meetings and other facilitated meetings. In each case, materials needed will include tablets, markers, sign-in materials, water or cold drinks for community members, reference materials, and easels. A minimum of 30 focus groups are expected to be scheduled each year of the program in addition to multiple community meetings.	3,000	3,000	6,000
<b>Office Supplies.</b> Funds are included for office supplies and materials for the Project Director and key staff, supplies for secretarial support, copy paper and toner, office communications, and other critical methods required for program implementation. Expected costs are \$500 per year for year one and \$400 for year two of the grant.	500	400	900
<b>Software.</b> Technology software (such as Davis Demographics, Citygate CIS, and ARC GIS) to guide enrollment, including a revision of feeder patterns and school boundaries, will be purchased. Using the revised definition of diversity and the new magnet schools as prototype, the software will be used to meet the grant and district goal of reducing racial isolation and increasing diversity.	15,000	0	15,000
<b>CONTRACTUAL</b>	85,500	50,750	136,250
<b>Technical Assistance on Demographics.</b> The project will work with leading experts on school demographics such as Portland State University's Population Research Center to provide critical demographic studies to inform discussion and decision-making on assignment plans to meet project goal and objectives. Similar contracts have been project-based on an annual basis at a cost of \$10,000 - \$25,000 per year. A member of this organization will serve on the Advisory	15,000	15,000	30,000

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Team throughout the grant.				
<b>Technical Assistance for Legal and Strategic Development.</b> The budget includes critical consultation with legal professionals, comparable school district professionals, and nationally-known experts to provide guidance and leadership towards district student assignment plans that are legally sustainable as well as fair, sensitive to community needs, and meeting stated objectives. Consultant costs range from \$800 to \$1,800 per day, depending upon number of contract days and area of specialization. The budget covers an average of 5 days @ \$1,800 (legal), 8 days @ \$1,000 (strategic planning), and 6 days @ \$500 (local strategic planning). This cost is included for only the first year of the grant.	20,000	0	20,000	
<b>Technical Assistance for Community Engagement.</b> Funding is included for technical assistance for significant community engagement. Costs will include a contract with a local umbrella organization (such as The Urban League) that will facilitate numerous community neighborhood and minority organizations' participation and engagement each year of the project at a contractual cost of \$10,000 each year. Additional expenses include external technical assistance to evaluate, plan, and lead community engagement meetings (three in year one and two in year two) at a cost of \$5,000 per meeting.	25,000	20,000	45,000	
<b>Technical Assistance for Enrollment Technology Support and Training.</b> Technical assistance is included to provide critical training and cross-training for three staff members on the Davis Demographics enrollment software technology. The training will increase the district capacity to meet project goal and objectives and continue the goal of reduced racial isolation and resegregation beyond the period of federal funding. The training will occur in year one of the grant.	9,750	0	9,750	
<b>Technical Assistance for Community Focus Groups and Facilitation.</b> Funds are included for technical assistance and consultants to advise and support large groups (4 at \$3,000 each year of the project) as well as provide facilitators for smaller focus groups (\$125 each for 30 groups each year of the grant). The provider will evaluate and analyze results from each group, providing a detailed analysis to be used to inform discussion and decision making on the student assignment plans.	15,750	15,750	31,500	
<b>OTHER</b>	<b>2,000</b>	<b>2,000</b>	<b>4,000</b>	
<b>Printing.</b> The budget includes costs for printing materials for community meetings with technical assistance providers, focus groups, facilitators, meetings of the Advisory Team, and long-term sustainability of the project. Costs are minimal due to district's ability to use in-house	500	500	1,000	

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printing facilities.				
<b>Advertising.</b> Funds are included in both grant years for the district's Office of Workforce Diversity and Development to supplement recruitment efforts within the minority and underrepresented communities to diversify the district's workforce, particularly on this project. Efforts will be made to advertise opportunities in minority owned and supported publications for focus group participants, facilitators, support organizations, and for other opportunities within the district. These costs are aligned to the goal and objectives of the project.	500	500	1,000	1,000
<b>Space Rental.</b> Costs include rental costs for 10 sites at \$100 per site each project year for community meetings and focus groups. Meetings will be held both at local schools as well as at area community halls, churches, and other sites; minimal costs are required by non-school sites to cover the cost of maintenance and cleaning for 2-3 hour meetings.	1,000	1,000	1,000	2,000
<b>DIRECT TOTAL</b>	<b>138,823</b>	<b>95,897</b>	<b>234,720</b>	
<b>INDIRECT COSTS</b>	<b>9,024</b>	<b>6,233</b>	<b>15,257</b>	
<b>Indirect Costs.</b> Portland Public School's Indirect Cost Rate (documentation attached) is approved by the State of Oregon on an annual basis. The current approved rate is 6.5%. The district is in the final stages of approval for the 2009-2010 year but the new rate has not been approved.	9,024	6,233	15,257	
<b>TOTAL REQUEST</b>	<b>147,847</b>	<b>102,130</b>	<b>249,977</b>	

# Budget Narrative

## Budget Narrative

### Attachment 1:

Title: **Budget Narrative** Pages: 4 Uploaded File: Y:\My Documents\Grants\Student Assignment\Budget Narrative.doc